



GETTING STARTED

ENTERPRISE V5

TELEMAGIC®

ENTERPRISE

Version 5

For help not found in this manual call TeleMagic:

United States:	972-818-3900	<i>Administration</i>
	800-835-6244	<i>Customer Service</i>
	972-713-0259	<i>Technical Support</i>
United Kingdom:	191-255-3000	<i>Administration</i>
	191-255-0616	<i>Technical Support</i>

Web Site: www.telemagic.com

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THE SAGE GROUP PLC

TABLE OF CONTENTS

Table of Contents

Introduction.....	1
TeleMagic Program Features.....	2
Manual Conventions.....	7
Basics of Using TeleMagic	9
Contact Management.....	19
Using the Contact Manager	20
Opening a Database.....	20
The Contact Manager	22
Viewing Contact Record	26
Adding Contact Records.....	30
Entering and Editing Data	31
Goto.....	36
Closing the Contact Manager	40
Personal Calendar.....	41
Opening the Activity Manager	42
Activity Scheduling.....	44
Viewing Activities & To-Dos.....	61
Viewing and Editing Existing Activities and To-Dos.....	72
E-Mail.....	75
TeleMagic Internet Mail	76
Setting Up TeleMagic Internet Mail	78
Working with Existing E-mail Messages.....	82
Sending E-mail Messages.....	84
Receiving E-Mail Messages.....	88
Other E-Mail Features	90
Using TeleMagic with Microsoft Outlook.....	95
Dialer	103
Phone Calls.....	104
Answering the Phone.....	110
Branch Scripting	113
What are Scripts?	114
Using Scripts.....	114

Word Processing	119
Word Processing in TeleMagic	120
Merging with TeleMagic	120
Creating Documents and Form Letters Using the Merge Feature	122
Quick Letter	133
Starting a Mail Merge.....	134
Faxing.....	139
Getting Ready to Fax	140
Sending a Fax.....	140
Wireless Messaging	151
Wireless Messaging with TeleMagic	152
Using Wireless Messaging.....	152
Sales Forecasting.....	159
Forecasting Sales	160
Notes and Messages.....	179
Notes and Messages.....	180

INTRODUCTION

TeleMagic Program Features

TeleMagic is a fully customizable, relational Contact and Business Automation Manager integrated with Productivity Tracking, Report Generation, Auto-Dial, Word Processing, Faxing, Wireless Messaging, and Electronic Mail capability. TeleMagic is available in both single-user and network versions.

Contact Management

- ???Three-level relational database structure
- ??User-defined multi-page views
- ??Configurable pages
- ???Full customizability—you can store any data you like, any way you like
- ???Multiple field types
- ???User-defined List Boxes Data entry templates, default values, calculated fields and validity checking for any field
- ? Unlimited user-defined indexes and filters
- ???Field level security
- ???Powerful record search capability
- ???Editable Browse window
- ???Browse list of pending activities
- ???Duplicate record checking
- ???Complete or Delete activities from the Contact Manager
- ???User-defined toolbars
- ???Restricted Filter and Index lists

Activity Management

- ???Scrollable daily, weekly, and monthly views
- ???Separate Activity and To-Do listings
- ???Reschedule and re-prioritize using “drag and drop”
- ???Single-click check-off of completed tasks
- ???Associate Contacts with Activities and To-Do’s
- ???Assign and view status of tasks assigned to others
- ???View and modify other users’ schedules (when granted permission)
- ???Icons to indicate type of activity

- ???To-Do display includes deadline, overdue rollover, and completed items
- ???Multi-day activity scheduling
- ???Recurring activity scheduling
- ???Scheduling conflict warnings
- ???Calendar security
- ???Alarms with or without TeleMagic loaded
- ???Activity Browse
- ???Activity Archive
- ???Quick deletion of completed activities
- ???User defined weekends and holidays

- ???Assign activities to a group of users
- ???Assign resources to activities
- ???Assign activities on one user's schedule to another user
- ???Move groups of activities to a new time slot
- ???Automatically create an activity for all contacts in a filter and assign them to one or more selected users
- ???User-defined Activity view
- ???Display activities only on the Browse view (Hide activities)

Report Generation

- ???Standard reports on various areas of TeleMagic, such as faxing and sales forecasting
- ???Activity reports including printout to popular "day planner" format
- ???Envelope, label, and "rotary index" printing
- ???Contact and Phone Lists
- ???Quick reports for novice users
- ???Mass Mailing capability
- ???Configurable Reports Menu

- ???Custom report writer including:
 - Report titles and summaries
 - Multiple fonts, pitches and styles
 - Page orientation and size selection
 - Calculated fields with input prompts
 - Full color illustration and OLE
 - Headers and footers by page and group
 - Print Preview

E-mail

- ???Integrated e-mail system
- ???Send e-mail to single users or groups
- ???Compatible with MAPI servers
- ???Copy, forward and print e-mail
- ???Tag multiple e-mail for quick maintenance
- ???Internet E-mail capability
- ???Link messages to contacts
- ???Automatically link incoming messages to contacts based on address
- ???Filter incoming messages based on the content of the address, subject, or message body
- ???Multiple Address Books:
 - ??MAPI (if using a MAPI server)
 - ??TeleMagic users (automatically updated)
 - ??Internet (custom)
- ?? Access contacts from messages
- ????TagLines
- ????Queue messages locally, or to the Automation Server
- ????Attach files and merge documents
- ???Automatic spell check
- ???Encrypted storage
- ???Multiple account profiles
- ???Use Microsoft Outlook with your TeleMagic databases *new*

Word Processing

- ???Microsoft Word? 97 and 2000
- ???Lotus WordPro? 97 and 2000
- ???Corel WordPerfect? 8 and 9
- ???Base new documents on previously created templates
- ???Share documents between users, or keep personal documents private
- ???Link documents to contacts and create rollup lists of linked documents on contacts' records
- ???Command line for OLE word processors automatically determined
- ???Retain copies of merge documents—linked to the contact
- ???External merge fields
- ???Concurrent multiple word processors supported

Faxing

- ???A fully integrated faxing system
- ???Fax individual contacts or all contacts in a filter
- ???Include merge fields in all pages being faxed
- ???Fax locally or from a dedicated server
- ???Extensive fax preferences to customize faxing
- ???Multiple servers and queues
- ???Support for any Class 1 or Class 2 faxmodem

- ???Support for unlimited workstations processing faxes, with up to 8 faxmodems per workstation
- ???E-mail notification on completion of faxes
- ???Links with the Activity Manager and contact records for fax history tracking
- ???Comprehensive troubleshooting tools
- ???Fax TeleMagic reports
- ???Fax external documents from other applications

Wireless Messaging

- ???Send Wireless Messages to contacts or TeleMagic users
- ???Maintenance screen for messages sent locally

- ???Send messages locally or from a server
- ???Send Wireless Messages regarding activities or e-mail

Other Communications Features

- ???The Bulletin Board provides a forum for all users
- ???Tack-Its provide a means of attaching notes to records or databases

- ???The Message Taker informs users of calls and visitors that arrived in their absence

Power Features

- ???True multi-user (network) capabilities
- ???Auto dialer
- ???Context-sensitive help
- ???Database synchronization

- ???User-definable keystroke macro
- ???Export to:
 - TeleMagic
 - dBase III Plus?
 - SDF
 - Delimited formats

User-definable delimiter formats	???Microsoft Excel version 2.0 worksheet
? Import from: ???Comma Delimited Format	?? Microsoft Excel version 5.0 worksheet
???Standard (System) Data Format (SDF)	??User Defined Delimited
???TAB Delimited Format	??Relate separate database files to different levels in a TeleMagic database
???????VisiCalc(r) Data Interchange Format	??Any prior version of TeleMagic
???Microsoft Multiplan(r)	?? System and field level security and password protection
???Microsoft MultiPlan Symbolic Link	
???Lotus(r) 1-2-3(r) version 2.x spreadsheet	????Sales Forecasting capability
???Lotus 1-2-3 version 1a spreadsheet	????A Branch Scripting module for use with phone scripts
???Lotus Symphony(r) version 1.1 or 1.2 spreadsheet	????TeleMagic contact import formats that include linked activities
???Lotus Symphony version 1.0 spreadsheet	???Spell Checker
???Comma Separated Value	???Century Rollover feature to help prevent ambiguity in two- digit year entries

Manual Conventions

This guide is designed to provide you with a brief overview of the main TeleMagic features. For complete instructions and more detailed explanations, refer to the related topic in on-line help. To access on-line help, select **H**elp, **H**elp **I**ndex from TeleMagic's main menu. To access context-sensitive help for the area of TeleMagic you are currently using, press F1.

Keyboard Conventions

Keyboard/Mouse Alternatives: While explanations are provided primarily for mouse commands or menu selections, alternative keyboard commands may follow. For example, “To add a record to the current level, select **Q**uick **A**dd from the **C**urrent **R**ecord menu or press CTRL+Q”. Note also that it is a Windows convention to underline the “hotkey” that allows keyboard access to a command.

Note: If you are using certain international or Dvorak-style keyboards, hotkey combinations may not work as expected in all TeleMagic programs.

Key Names: Key names are always shown in small capital letters. For example, the Escape key is shown as ESC; the Control key is shown as CTRL.

Arrow Keys: (? ? ? ?) are shown as UP ARROW, DOWN ARROW, LEFT ARROW, and RIGHT ARROW, respectively.

Keystroke Combinations: Keys that are pressed simultaneously are noted with a “+” sign between keystrokes. For example, CTRL+S indicates that you should hold down the CTRL and the S key at the same time.

Mouse Conventions

It is assumed that the left mouse has been set up as the primary button. If you use the mouse with your left hand, the buttons may be reversed.

Click: This instruction requires you to point at an object, then press and release your primary mouse button quickly.

Double-click: When you see this instruction, point at an object, then press and release your primary mouse button twice in quick succession.

Click and Drag or **Drag:** At this instruction, point at an object and hold down the primary mouse button while you move that object.

Drop: Usually after dragging an object you will be told to drop it, which means to release the primary mouse button.

Text Conventions

Verbatim Entries: Text you must type verbatim is shown in bold. For example, if you are instructed to enter: **xxx**, you would type the letters: xxx (in lowercase). If uppercase letters are required, text will be shown in uppercase.

Optional Entries: If you have an option of what you can enter, such as in the case of file names or directories, a place holder is shown in bold italics. For example, if you were to enter the name of your database, the instructions would tell you to type the ***database_filename***. For a database called Contacts, you would type **contacts**.

On-screen Text: Field names, pop-up warnings and any other text that appears on the TeleMagic screen will be shown in this typeface: **Example of on-screen text**.

Menu Options, buttons, and tabs will be shown in bold face text with the appropriate hot key (if applicable) underlined. Graphical buttons (those which have no text) will be referred to in regular text, each word capitalized, as described in the button's ToolTip.

PATH AND FILE NAMES: File, program, and directory names are shown in all capital letters. For example, a file stored on your hard drive in the directory containing the TeleMagic program files might have the path and filename C:\TMWIN\TM.EXE.

Illustrations

Dialog Boxes: Pictures of dialog boxes will be shown using the default Windows color scheme and, except where otherwise indicated, sample data based on the Documentation Database.

Screens: Pictures of screens will follow the same general conventions as dialog boxes, except they will probably be shown in a reduced resolution.

Toolbars: TeleMagic Enterprise V5 makes extensive use of *dockable* toolbars. These toolbars can be moved and reshaped. Also, toolbars used in the Contact Manager can be reconfigured with different tools. Illustrations of toolbars will be in default configuration and horizontal orientation, except as indicated.

Instruction Conventions

Sets of instructions are indented slightly and numbered.

The word **close** means that the dialog box or window will close and, if applicable, any changes will be saved automatically.

The word **save** means that current work will be saved, leaving you free to execute other commands without losing any changes you may have made.

The word **cancel** means that the current window will close, without saving any changes or affecting previous settings in any way.

Tools referred to on toolbars are not necessarily configured on the toolbar by default. If an instruction refers to a control that does not appear on your toolbar, and you do not want to add the control to the toolbar, use the alternate method.

Symbols

Note: Additional information concerning the current section of text will appear in this format. Notes may be reminders, suggestions, or information that may or may not pertain to your installation. For example, instructions on deleting databases may contain a note regarding databases being used with Data Synchronization Server.

WARNING! Indicates precautionary information. Please read carefully before proceeding.



This symbol indicates a one-step procedure, or a set of alternative procedures.



The flag denotes advanced procedures and features of the program. Generally these may be used *in addition to* basic program functionality. Tackle these after you have mastered the basic functions of TeleMagic.



Hint: This is information from our file of technical tips and tricks. Hints are usually examples of how a feature may be used, or of how different features can be used together.

Basics of Using TeleMagic

TeleMagic consists of menus, windows, and list boxes that make it easy for you to use the program. Throughout the documentation, if you encounter a term that is not familiar to you, refer to the *Glossary* in on-line help. Most frequently used terms are defined in the *Glossary*.

Starting the Program and Logging In

Note: This section assumes that the system administrator has already opened TeleMagic, performed registration, and added all necessary users to the system. If initial setup has not been performed, refer to the *System Administrator Guide*.



Hint: You can have up to 3 instances of V5 running simultaneously. (You must have sufficient system resources to run multiple instances of TeleMagic. For information on system requirements, see the *System Administrator and Installation Guide*.)

To Start TeleMagic:

Note: If you are running Windows NT or 2000, and you are not an administrator, TeleMagic will not be able to install the fax driver. This will result in a message on startup. The fax driver only needs to be installed once. It is recommended that a Windows NT administrator start TeleMagic the first time it is run on each Windows NT workstation.

1. Select **Start** on the taskbar, then select **Run** from the Start menu. Enter the path to the file TM.EXE in the TeleMagic global directory path (C:\TMWIN by default).
- or** Locate and double-click the TeleMagic program icon:



TeleMagic will start, flash through the license screen, and display the TeleMagic menu bar and Logon dialog box.

Note: Your copy of TeleMagic may have been installed so that you are automatically logged in, a specific database is automatically opened, and a contact view page automatically displayed. If so, some of the following steps are not applicable.



TeleMagic Logon Dialog Box

Note: If a User Name field appears on the above dialog box, this installation of TeleMagic has not been set up. Unless you are the system administrator, click **Cancel** to exit this dialog box and contact your system administrator.

2. Type your three-character User ID.

Note: A supervisor user assigned your User ID and password. If you do not know your User ID, contact your supervisor or system administrator.

The cursor will move to the **Password:** field.

3. Type your password. (For security reasons, text entered in the password field will be in a security font. All characters will appear as asterisks.)
4. Click **OK**.

Note: If you have typed your password incorrectly, you will have two more tries. After the third incorrect attempt, the program will close.

Depending on your setup, one of two things may happen. If a default database has been defined, the Contact Manager will open:

The screenshot shows a window titled "Company - Academe". It contains several sections:

- Company Information:**
 - Company: Academe
 - Address: 8225 Elm St.
 - City: New Haven
 - State: CT
 - Zip Code: 06511
 - Country: USA
 - Postal Code: (empty)
- Main Phone:**
 - (US/Canada): 203-555-7241
 - (International): (empty)
- Account Summary:**
 - Status: Customer
 - Type: Retailer
 - Start: 06/18/96 10:35:08 TST
 - Last Revision: C-06/18/1996 10:41:11 TST
 - Region: NW
 - Potential: B
- Contact List:**

Contact Name:	Contact Phone:	Account Rep:
Blair Corey	203-555-8766	KMK
Cynthia Montesque-Smythe	203-555-8900	KMK
Marietta Sterne	203-555-6779	KMK
Horace Abrahms	203-555-8915	KMK
- Contacts for This Company:** (Text label)
- Data in Blue is Mandatory!** (Text label)

Level 1 (Company) Screen of the Default Database

If no defaults have been defined, the Select Database selection box will open:

The screenshot shows a dialog box titled "Select Database". It contains a list box with the following items:

- Company/Contact Database
- Documentation Database
- Opportunity Database

To the right of the list box are several buttons:

- Open
- No Database
- Add
- Change
- Delete
- Copy
- Usage

Sample Select Database Selection Box

This selection box will contain a list of all of the databases in this installation of TeleMagic. You must select a database to associate your scheduling, word processing, and other functions to specific contacts.

5. Highlight the database you want to open and click **Open**.

Note: Most of the examples in this guide are based on the Documentation database. If you will be following the examples in this guide, we recommend using the Documentation database to explore TeleMagic.

The Select Database selection box will disappear, and the database you selected will open.

TeleMagic allows you to add fields to a database and put those fields on the screen in any way you like. TeleMagic recognizes the fact that not everyone will want to see those fields in the same way, so it allows you to create multiple views to display your data in different ways. A view is all of the screens (or pages) for a particular database. The first time you open a database, you must select a view, unless you establish a default view before opening the first time.

6. Select the appropriate view from the list, and click **Select**.

The Contact Manager will open to the selected view.

Using TeleMagic with Windows

TeleMagic ordinarily follows standard Windows procedures when dealing with menus, dialog boxes, and the TeleMagic window.

TeleMagic Toolbars

There are three toolbars available for use with the Contact Manager: the System Toolbar (which may include tools that are used outside the Contact Manager), the Primary Contact Manager Toolbar, and the Secondary Contact Manager Toolbar. Of these, the System Toolbar and the Primary Contact Manager Toolbar are pre-defined. All three can be customized to meet your specific needs. The two Contact Manager toolbars have the same tools available, while the System Toolbar has its own set of tools. All of these toolbars can be docked to any edge of the Contact Manager screen, or they can “float” anywhere on the Contact Manager Screen. Toolbars are also used with other TeleMagic functions, such as the Notebook and TeleMagic Internet Mail, but only the System and Contact Manager toolbars are fully configurable. The default configurations do not include all of the tools available. To add more tools, see the Toolbar page in Preferences.















The System Toolbar

The System Toolbar is located directly below the main menu bar, and provides quick access to TeleMagic's most commonly used commands. The toolbar can be customized to hold buttons representing the menu commands that you use most often. The default toolbar looks like this:



The Default System Toolbar

The default buttons on the System Toolbar are:

	Exit TeleMagic		Send Wireless Message
	View your Schedule		Launch TeleMagic Internet Mail
	Pending Activities		Spell Check
	Browse		Set Recall
	Add a Tack-It		Answer the phone & start a call
	Word Processing		Dial
	Fax		Context Sensitive Help













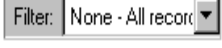



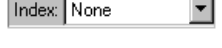




The Contact Manager Toolbar

The Contact Manager Toolbar, also called the Primary Contact Manager Toolbar, appears by default near the bottom of the screen. The Secondary Contact Manager Toolbar is available, but is not pre-defined. All tools that are available for the Primary are also available for the Secondary. Contact Manager toolbars are used to navigate and manage your database.



The Default Primary Contact Manager Toolbar

The default buttons on the Primary Contact Toolbar are:

	Level Buttons		Edit this record (toggles to Save)
	Go to the first record in the current filter		Cancel changes to the current record (active while in edit mode)
	Go to the previous record in the current filter		Delete the Current Record
	Open the Goto dialog		Copy the current record
	Go to the next record in the current filter		Add a note to the notepad of the current record
	Go to the last record in the current filter		View the notepads for this record
	Filter drop-down list		View activities linked to this record
	Filter Count		View linked documents for this contact
	Index drop-down list		View/Edit TeleMagic E-mail Messages
	Add a new record		View/Edit Sales Forecasting Records
	Quick Add		

Customizing the Toolbars

You are not limited to using the default toolbar. TeleMagic provides tools for most of the features included with the program, and allows you to create your own tools. Customizing your toolbars can save a lot of time and energy. There are three kinds of tools that can be added to the toolbars:

- ?? Pre-defined tools which call menu options usually available from the main menu system.
- ?? User-defined tools that call user-defined function keys
- ?? User-defined tools that start external programs

Note: Instructions throughout this manual, the System Administrator and Installation Guide, and the online help system refer to controls which are not necessarily configured on the System or Contact Manager Toolbars by default. If you frequently use a procedure that uses a tool which is not configured by default, consider adding that tool to one of your toolbars.

Security

The system administrator will ordinarily control security. Any user can change his or her own password.

Setting a Password

To Change Your Logon Password:

1. From the **Options** menu, select **C**hange Password. A dialog box will appear asking for your current password.



Change Password Dialog Box

2. Type your current password in the Enter Current Password: field and press ENTER. The Enter Current Password: field will not be available after you proceed to the next field.
3. Type the new password in the Enter New Password: field.
4. Type the password again to verify it in the Verify New Password: field.
5. Click **OK** to save your new password.

Controlling Access of Other Users/Groups to Your Activities

To Control Other Users' Access to Your Calendar:

1. From the **Activity** menu, select **U**ser **P**ermissions.
The Activity Access dialog box will open.
 2. Highlight the user in the Users With No Access list to whom you want to grant access to your calendar.
 3. Click **A**dd.
- or** Click **Add All** to give all users access to your calendar.

The selected user will be added to the **Users With Access** list.

4. Select the level of access to be granted by selecting the **View Time Block Only**, **View Full Detail**, or **Full Access** radio button.
5. Repeat steps 2 through 4 as required to grant access to all of the users who should have it.
6. Click **OK** to save your changes and exit.

To reverse the process, select the user you want to revoke permission from on the **Users With Access** list and click **Remove**. To remove permission from all users currently on the list, click **Remove All**.

You can limit the level of access that any user has to your calendar. By default a user is granted view-only access to your calendar. This is the most restrictive level of access. You can allow other users to view activity details, or you can allow them to schedule activities on your calendar. You can change the default level of access granted by clicking on the **Set Default** button and selecting the desired default level offered on the **Default Access Permissions** dialog box.

Note: If you are a member of a group, and an activity is assigned to that group, the group activity can be shown on your calendar even if the originator of the group activity does not have scheduling permission to your calendar. To allow group scheduling by users who otherwise do not have scheduling rights to your calendar, mark the **Allow all users Group Scheduling rights to your calendar** on the **Activity** page of the **Preferences** dialog box.

To Set the Level of Permission a User is Granted:

1. From the **Activity** menu, select **User Permissions**.
The **Activity Access** dialog box will open.
2. On the **Users With Access** list, highlight the user you want to edit.
The user's name will appear in the **Set Activity Permissions for:** field. (This is a read-only field. You cannot enter the user's name directly.)
3. Select the radio button that indicates the level of access you want to grant to the selected user.
4. Click **OK** to save your changes and exit.

Setting and Customizing Preferences

There are three basic categories of preferences: *User*, *Database*, and *Global*. Each of these categories refers to the scope of the preference sets within that category. For example, changes made in the preference sets within the *User* category will affect only the user making the change, while changes made in the preferences sets within the *Global* category will affect all users in the installation.

Which preference sets are available to any particular user will depend on which security group(s) he or she belongs to. A user may not have access to preferences at all, they may have access only to User preferences, and they may have access to User preferences and access to database preferences in some databases. Members of the Supervisor security group have access to all preference categories.

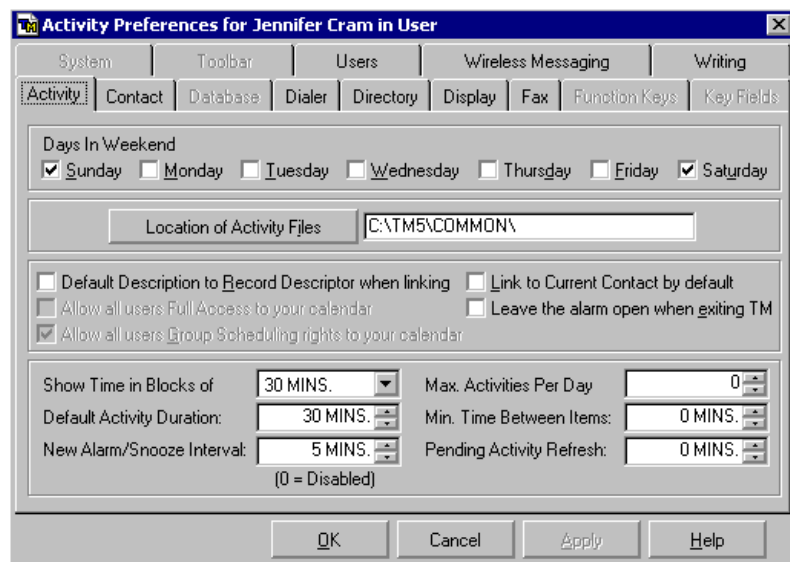
Note: Do not confuse the User preference category with the User Preferences page. The User Preference page is one of the Global preference sets. This page is accessible to all users with access to Preferences, but non-supervisors will only be able to make changes to themselves, and will not be able to view or add new users.

The Toolbar and Function Key preference sets can be associated with any preference category. The preference category of the currently open preference set is indicated in the title bar of the Preferences dialog box.

To Set or Change Preferences:

1. From the **Options** menu, select **P**references.

The Preferences dialog box will appear:



The Preferences Dialog Box

2. Click on a tab to set preferences for the function indicated.

The selected page will open.

3. Customize the selected function as desired.

Note: Press F1 at each page for details on the options available.

4. When you are satisfied with your selections for the current page, choose **OK** to save the changes and exit the dialog box.
- or** Select another tab and set preferences for another function.
- or** Click **Apply** to save changes without closing the dialog box or leaving the page.
5. Click **Cancel** to exit preferences. (**OK** will save the changes to the current preference set; **Cancel** will abort them.)

Saving Settings and Exiting TeleMagic

Before you exit TeleMagic, you may want to save your current settings. Save Settings on Exit allows you to automatically use the current settings the next time you use TeleMagic. When you activate the Save Settings feature, the following information is recorded every time you close the program:

- ?? Which database (if any) was last open
- ?? Which page of which level you were last viewing; or, if you were not using the Contact Manager, which view of your Activity Manager was open.
- ?? Which filter and which index were last active

Saving settings will save you time from searching to find your previous place the next time you open the program.

Note: Saved Settings override any other preferences you may have set to control what happens when you open TeleMagic. Specifically, it will override the **Controlling Level** option on the Database Preferences screen and your **Startup Database** in Contact preferences.

To Save Settings for the Current Session:

- ☞ At any point during your TeleMagic session, from the **Options** menu, select **Save Settings on Exit**.

A check mark shows that the option is activated. When you close the program, it will save your settings.

It will remain activated, saving different settings every time you exit TeleMagic, until you uncheck the option.

When this option is unchecked, TeleMagic will open as indicated in Preferences.

To Exit TeleMagic:

- ☞ From the **File** menu, select **Exit**.

or Click on the **Exit** button .

or Press ALT+ F4.

CONTACT MANAGEMENT

Using the Contact Manager

The Contact Manager is the main work area in TeleMagic. Almost all of the other areas in TeleMagic will reference the records you place in the Contact Manager. For example, you can print reports on your contact data, send letters and faxes to your contacts, and use the Dialer to place phone calls to your contacts.

Contact records are made up of fields where you enter data. For example, you may have one field to contain a company name, another to contain its address, another to contain its city and so on. These fields will appear in the work area on your screen. You may have one or several screens (or pages) full of fields that make up an entire record.

Contact records are stored in databases. A database is a set of contact records designed to contain a specific type of information. Depending on your setup, your installation of TeleMagic may have one database, or many. Before you start to work in the Contact Manager, it is a good idea to familiarize yourself with the databases you will be using.

Note: TeleMagic was designed primarily to contain records related to people, such as your business contacts. (This is why it includes the ability to send faxes, pages, and create form letters for the records.) When referring to records, this guide will often use terms like contacts, or contact records. This does not mean that you are limited to only storing information about people in your databases. On the contrary, TeleMagic can be configured to contain anything you like. Any information you need to record can be kept in a TeleMagic contact record.

Opening a Database

To Open or Change a Database from the File Menu:

Note: Throughout this guide, we use the Documentation database to explore TeleMagic. Most of the examples in this manual are based on this database. To switch to the Documentation database, follow these steps.

1. From the **F**ile menu, choose **S**elect Database.

The Select Database selection box will appear. Only databases to which you have access will be displayed.

2. Highlight the name of the database you wish to open using the mouse or the UP/DOWN ARROWS.
3. Press ENTER or click **O**pen.

Note: To run TeleMagic without a database, choose **No Database**. The Activity Manager will open. If you do not open a database, most menu options will not be available.

The Select Database selection box will close. The database you selected will open.

When the database is opened, one of two things will occur.

If a default view has been established for this database, the Contact Manager will open to the default level and page:

Contact - Blair Corey at Academe

Contact Name: Blair Corey
 Title: Chief, Purchasing
 Dear: Blair
 Alternate Contact: Peter Wiley (Secretary)

Phone Numbers:
 Office: 203-555-8766
 VMail: 203-555-8765
 cellular: 619-555-4536
 Fax: 203-555-4989
 Home:

Notes:
 08/20/2099 4:42p - JRC - Out. 6.43.
 Status: Completed - Call to Verify our July Meeting Notes
 Says the minutes I Faxed last week were accurate; will consider backdating the contract to the verbal commitment date we discussed.

Record History:
 Start: 06/18/96 10:35:09 TST
 Last Revision: -06/18/1996 11:00:55 T9

company: Academe
 dept: Purchasing
 custid: DEM9606180072

1st Contact: Not found
lastcall: Call not found
Next Call: Call not found

Account:
 Rep: KMK
 Status: Customer

Documentation Database Contact View, Level 2 (Contact), Page 1

- or** If you have not selected a default view, you will see the Select View dialog box.

A view is a collection of pages that make up one level of a database. For any database level you can have several views offering a variety of ways to see records on the level. If you have only one view, it will be opened by default. (The Documentation database contains only one view at each level.)

- Highlight the appropriate view in the list and click **Select**. The Contact Manager will open.

Note: If the database opens with just a toolbar and a blank page, the Contact Manager is closed.

The Contact Manager

In TeleMagic, the Contact Manager is your window into databases. With the Contact Manager open, you can view, sort, add, edit, and delete contact records in the current database. When you open a database, the Contact Manager will usually open, showing records for that database. If it is not open, you will see a blank screen and you must open the Contact Manager.

To Open the Contact Manager:

☞ From the **C**ontact menu, select **O**pen **C**ontact Manager.

The default Contact View page of the current database will be displayed.



Contact Manager Layout

Note: Throughout this guide we use the Documentation database to explore TeleMagic.

To move among Contact Views, pages and records, you will use one of the TeleMagic Contact Manager Toolbars. When you first open the Contact Manager, the default Primary Contact Manager Toolbar looks like this:



Primary Contact Manager Toolbar (not in Edit mode)

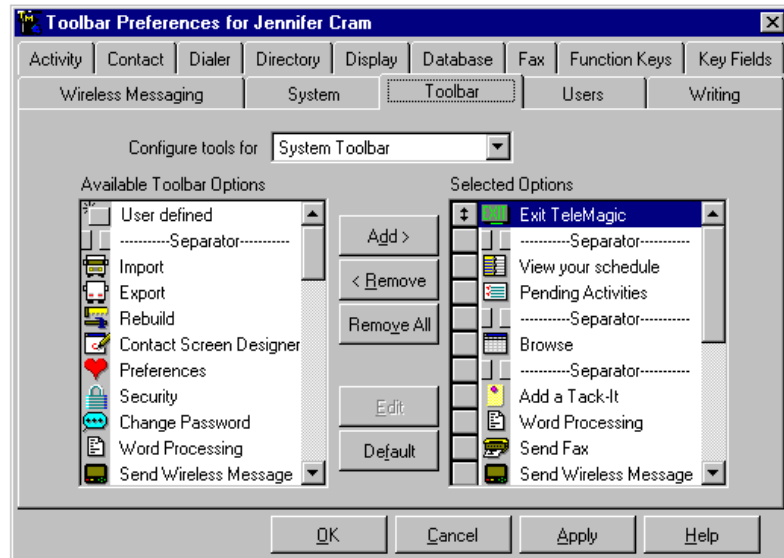
As soon as you click the Edit button , or click on any field on the record you are viewing, you are in edit mode. While in edit mode you can alter the current record, which is now locked. (No other users will be able to open it while it is locked.) The Edit button becomes a Save button . The Primary Contact Manager Toolbar is user-definable and dockable (it can be moved and resized).

There is one Contact Manager Toolbar defined by default. You can have two Contact Manager Toolbars. The toolbar which is defined by default is called the Primary Toolbar, the optional toolbar can be created and defined in the same way as the Primary Contact Manager Toolbar, except when choosing the toolbar to be defined from the drop-down list you will choose the Secondary Contact Manager Toolbar.

To add controls to a Contact Manager Toolbar:

1. From the **O**ptions menu, select **P**references.
The Preferences dialog box will open.
2. Click on the **T**oolbar tab.

The Toolbar Preferences page will open:



The Toolbar Preferences Page

3. From the **Configure tools for** drop-down list, select **Contact Manager Toolbar** (Primary or Secondary).

The available and selected options displayed will reflect the current Contact Manager Toolbar configuration.

Note: Toolbars can be configured for one user, one database, or all users and databases depending on your Directory preferences. The preference will be indicated by the title of the Preferences dialog box when the Toolbar page is open.



4. From the **Available Options** list, click on the control you want to add to the Contact Manager Toolbar.

The choice will be highlighted.

5. Click **Add**.

or Double-click the control you want to add to the Contact Manager Toolbar.

The selected control will be added.

 **Hint:** The new control will be placed immediately above the active mover box in the Selected Options list .

6. Click **OK** to save changes and exit preferences.

To remove controls from the Contact Manager Toolbar:

1. Open the Toolbar Preferences page to edit the Contact Manager Toolbar. (Follow the instructions in steps 1 through 3 in *To add controls to the Contact Manager Toolbar*;, above.)
2. Click on any control you want to remove from the Contact Manager Toolbar.
The control will be highlighted.
3. Click **Remove**.
The control will be removed from the Contact Manager Toolbar.
4. Click **OK** to save changes and exit preferences.

To move the Contact Manager Toolbar:

1. Place the cursor over a non-control area of the toolbar.
2. Click and hold the left mouse button.
An outline will appear around the toolbar.
3. With the left mouse button still depressed drag the outline of the toolbar to the new location for the toolbar.
4. Release the mouse button.
The toolbar will be moved to the designated location.

When a Contact Manager Toolbar is not in a docking port the title bar will be displayed. When the title bar is present, it can be used as a non-control area for 'grabbing' the toolbar. The toolbar can also be resized.

Note: Unlike resizing a dialog box, the actual area of the toolbar will remain essentially the same; the height and width dimensions change proportionally. The only way to actually make the toolbar smaller or larger is by adding or removing controls.

To resize the Contact Manager Toolbar:

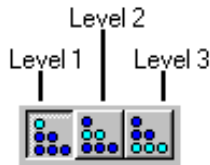
1. Place the cursor near one side or corner of the toolbar.
A sizing arrow will appear.
2. Click and hold the left mouse button.
3. Drag until the outline conforms to the desired proportions.
4. Release the mouse button.
The toolbar will reconfigure to the new dimensions.

Changing Levels, Views, and Pages

Each database is composed of one, two, or three levels. Each level is composed of one or more views. Each view is composed of one or more pages. Once you have a database open, you can move through the levels, views, and pages to view all of the information contained in the database. To fully explore a database, you should familiarize yourself with all levels, views, and pages in the database. Information in a record can be displayed in several places, only one place, or not displayed at all.

Changing Levels

To Change Levels Using the Contact Manager Toolbar:



☞ Click the appropriate level selector button.

To Change Levels Using the Keyboard:

☞ Press ALT plus the level number (ALT+1, ALT+2, or ALT+3).

Changing Views

To Change Views from the Main Menu:

1. From the Contact Manager menu, select Views.
The Views menu will open:
2. Highlight the view you would like to use and click.

Changing Pages

To Change Pages from the Main Menu:

1. From the Contact Manager menu, select Pages.
The Pages menu will open.
2. Click the page you would like to open.



To Change Pages from the Contact Manager Toolbar:

Note: You must have the Page drop-down list on your Contact Manager Toolbar to use this procedure.



1. Click the **Page:** drop-down list on the Contact Manager Toolbar.
This list will display all pages for the current level.
2. Highlight the page you would like to open.

To Change Pages from the System Toolbar


Note: You must have the Previous Page and Next Page tools on your System Toolbar to use this procedure.

 To go to the previous page, click the Previous Page tool. 

or

 To go to the next page, click the Next Page tool. 

To Change Pages from the Keyboard:

 Press PAGE DOWN to move to the next page.

or Press PAGE UP to move to the previous page.

Viewing Contact Records

There are two ways of viewing information:

- ?? One record at a time (using Contact View pages). Contact Views lay out information for a single record in an easy-to-read format.
- ?? Several records at a time (using Browse). Browse displays all records in a scrollable table, and allows you to compare two records side-by-side.

With either method, you have the option to view all records in the database, or only view a select group of records using a filter. You can also control the order in which records appear by using an index. (For example, in alphabetical order by company name.) TeleMagic comes with a selection of filters and indexes in each of the sample databases.

Selecting Filters and Indexes

Filters and indexes are selected from the **Contact Manager** menu on the menu bar, or the filter and Index drop-down lists on the Contact Manager Toolbar:

To Set an Index:

1. If you have not already done so, open the Contact Manager and choose a level.

Example: Company

2. From the **Contact Manager** menu, select **Indexes**.

or Open the Index drop-down list on the Contact Manager Toolbar.

Note: This control is not necessarily present on the Contact Manager Toolbar.

3. Highlight the desired index using the mouse and click.

or Use the ARROW keys to highlight the desired index and press ENTER.

Example: Company Name

4. Look through your records. They will appear sorted in the order you selected.

Note: Records with no value in a sort field will all be moved to the beginning or end of the record list depending on whether the index was originally defined as ascending or descending.

To Set a Filter:

1. If you have not already done so, open the Contact Manager and choose the level you wish to view.

Example: Company

2. From the **Contact Manager** menu, select **Filters**.

or Open the Filter drop-down list on the Contact Manager Toolbar.

Note: This control is not necessarily present on the Contact Manager Toolbar.

3. Highlight the desired filter with the mouse and click.

or Use the ARROW keys to highlight the desired filter and press ENTER.





Example: EC Companies.

4. Look through your records.

Using the example above, you will see only records for European Community companies.

Viewing Records One-at-a-Time

To Scroll Through Records on Any Page of Any View:

1. To move forward one record, choose the Forward control: 
or Press ALT + RIGHT ARROW KEY.
or From the **Contact Manager** menu, select **Next Record**.
2. To move to the last record, choose the End control: 
or Press ALT + END.
or From the **Contact Manager** menu, select **Last Record in Filter**.
3. To move back one record, choose the Reverse control: 
or Press ALT + LEFT ARROW KEY.
or From the **Contact Manager** menu, select **Previous Record**.
4. To move to the first record, choose the Beginning control: 
or Press ALT + HOME.
or From the **Contact Manager** menu, select **First Record in Filter**.


To View Records for the Current Parent Only:



1. Open any Level 2 or Level 3 record.
2. From the **Contact Manager** menu, select:

??**See Only Level 2 Records for Current Level 1** if you are on Level 2. This will cause only records that share the same Level 1 parent with the current record to be displayed in the Contact Manager.

??**See Only Level 3 Records for Current Level 2** if you are on Level 3. This will cause only records that share the same Level 2 parent with the current record to be displayed in the Contact Manager.

A check will appear on the menu beside the chosen option.
3. Scroll through the records. Records not related to the same parent record will not be displayed.

 **Hint:** When creating indexes, you have the option of creating indexes specifically for use with the See Only feature. If you have created any of these special indexes, they will be available in the **Index:** list.

4. To view all records again, from the Main menu, select **Contact Manager**,  **See Only Level 2 Records For Current Level 1** or  **See Only Level 3 Records For Current Level 2**. The check mark will disappear from the menu. All records will be available for viewing.

Viewing More than One Record at a Time (Browse View)

Contact Browse will bring up a browse window of your current level. (It is not restricted to the level on which you store your "contact"-related data.)

Note: In Browse view, memo (notepad) fields and general (OLE) fields are not shown directly—they appear as the words "memo" and "gen" respectively.

To Access Browse View:

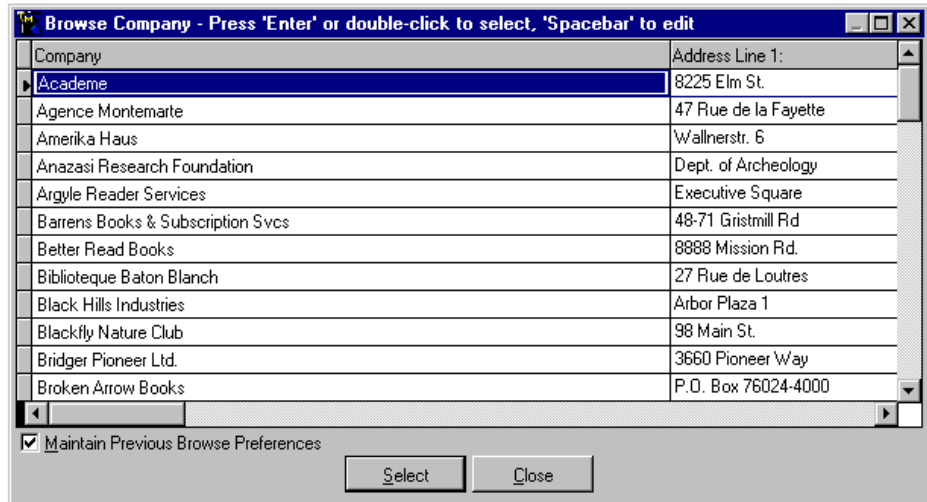
1. Open the Contact View for the level that you want to browse.
2. Choose a filter and index for the records you want to browse, if desired.

WARNING! You may experience delays when accessing Browse View if you are viewing a large database using a filter. (If you need to browse on a filtered group of records from a large database, use a filtered index.)

3. From the **Contact Manager** menu, select **Browse**.

or Click the Browse tool  located on your toolbar.

The Browse window will open:



Sample Browse Window

The prompt for each field in the level you selected will appear at the top of the Browse window. The corresponding data for each record will appear in column form beneath each field name.

Note: When fields are added, you have the choice of including them in Browse or not. If a field does not appear, it was probably not set up to display in Browse. Up to 225 fields will be available for display in a Contact Manager Browse window.

4. Use the scroll bars at the bottom and right of the Browse window to scan across records and down field columns.
5. To go to a record double-click on the record, or highlight it and press ENTER, or highlight it and click **Select**. Browse will close and the record will be displayed.


To Exit Browse View:

 Click **C**lose.

Note: If you choose Save Settings while in Browse View, the window size and position are now saved as well.

Adding Contact Records

WARNING! Do not attempt to add records without sufficient storage space to save those records. If you attempt to save without sufficient space, unexpected results can occur. You will need approximately .6 KB per record without OLE data. If you have OLE data, each object will require from 3.4 KB to several megabytes, depending upon object type and size.


Note: Adding records using the **Add**  button on the Contact Manager Toolbar will let you select the level and, if you are adding to Level 2 or 3, the parent for the new record. This control is not necessarily present, and may be on either of the two Contact Manager Toolbars.

To Quickly Add a Record:

1. If you are adding to Level 1, select **Quick Add** from the **Contact Record** menu. (Unless you or another user has already added the Level 1 record, you will need to start on this level.)
A new record will appear.
- or** If you are adding to any other level, go to the parent record to which you will be relating your Level 2 or 3 record.
- or** You can select **Add** from the **Current Record** menu. If you choose this option, the Add Record dialog box will open. Select the level for the new record by clicking the

appropriate button, or by pressing ALT+*level number*. The buttons on the dialog box indicate the level name and are ordered from 1 on top to 3 just above **Quick Add**.

2. From the **C**ontact Manager menu, set the See Only option on for the level to which you will be adding.
 3. From the Contact Manager Toolbar, select the level to which you wish to add. (This should be the next level down from the level you are currently viewing.)
 4. If there are no child records attached to the current parent, you will be asked if you would like to add a record. Select **Y**es.
- or** If there are existing child records, you will be taken to the first child on the level. From the Main menu, select **C**ontact, **Q**uick Add or press CTRL+Q.

A new record will open for editing. When you have finished creating the record, save it by clicking the Save button , or by selecting **S**ave from the **C**urrent Record menu. If you attempt to save a duplicate record, you will receive a warning. Depending on your Database Preference settings, you may not be able to proceed with saving a duplicate record.

Entering and Editing Data


TeleMagic uses many different types of fields. Most of these fields can be edited by simply placing your cursor in the field and using standard word processing commands. Other fields have been created to only contain specific data or specific types of data. (You can specify what data certain field types can contain by creating a template for the field.) Still others are automatically filled in based on the data from other fields, or even other areas of TeleMagic. Before entering data into your fields, it is a good idea to familiarize yourself with the fields in your database and exactly what information they are designed to contain.

Field Types

Most fields are *character fields*. In these, you can enter letters, numbers, periods, special characters (such as an asterisk *), and spaces.

Date fields can only contain actual dates. If you enter a date which TeleMagic does not recognize, such as 44/78/89, you will not be able to move on to the next field and will be returned to the beginning of the date field to correct the entry. Pressing the + key or the - key in an empty date field will enter the current date; pressing the + key or the - key in a date field with a current entry will move the day counter up or down by one day.


If you would like to enter the date using the Go To Date dialog box, and your Display preferences are *not* set to display a list box at date fields, press F2 or right-click.


 **Hint:** To use dates beyond the year 2000 in the abbreviated form (00, 01, etc.) in TeleMagic date fields, you can set the Century Rollover in System Preferences. For example: If you do not expect to enter dates earlier than 1990 in your database, set the Century Rollover to 90. Entering 90 or more will be read as 19xx, anything less than 90 will be read as 20xx. You will still be able to enter earlier dates in four-digit format, or by selecting them from the Go To Date dialog box. TeleMagic stores all dates in four-digit format, regardless of how they are displayed or entered.


Number fields are useful if you want to keep track of real numbers. These fields can only contain numbers and may be templated to contain decimals, signs (such as + or -), and spaces. You will not be able to type letters into a numeric field.

Memo fields are text fields which allow you to enter any amount of information. You can enter letters, numbers, special characters, and spaces into a memo field. A notepad is a special kind of memo field.

Checkbox fields are used to represent Boolean (true/false) information. A checkbox can be either marked or unmarked.

A *phone field* is templated to contain phone numbers and can be used with the Dialer feature. (The exact template was determined when the field was initially created.) Phone fields are preceded by a phone icon:  which can be used to dial the number contained in the field.

A *fax field* is templated to contain a fax number and can be used with the Fax feature. Fax fields are preceded by a fax icon:  which can be used to open the Send Fax dialog box where you can send a fax to the number in the field.

Pager fields are similar to phone or fax fields, except that they contain pager numbers. They can be used to send pages to contacts from the Contact Manager. Pager fields are preceded by a pager icon:  which can be used to open the Wireless Messaging dialog box with the contact's information entered.


Unique Number fields are designed to contain an automatically generated unique number. For example, you may have a page designed to create an invoice. A unique number field may be used to generate the invoice numbers. These fields cannot be edited manually.

OLE (General) fields hold pictures, sounds, charts, graphs, animations, and other objects created in other programs. You can edit these objects only by using the programs originally used to create them.


E-mail Address fields contain your contact's E-mail address and are used with TeleMagic Internet Mail to simplify communications. E-mail fields are preceded by an E-mail icon:



Click on the e-mail icon to start your default Windows e-mail application. If you make TeleMagic Internet Mail your default e-mail application, clicking this icon will open TeleMagic Internet Mail. To make TeleMagic Internet Mail your default mail client, select **Options** from the **Tools** menu in the Internet Mail program. On the General page, mark **Make TeleMagic Internet Mail my Default Mail Client**.


Web Address fields  are used to contain the website addresses (URLs) of your contacts. When you click on one of these fields, your Internet browser will be launched and the website contacted.

FTP Address fields  are similar to Web Address fields, but hold your contact's FTP information.

Newsgroup fields  contain addresses for newsgroups

Rollup Lists are special fields designed to list information relating to a record. You can have rollups of activities linked to a contact (Activity History field), child (or grandchild) records related to a record (Contact Rollup), lists of documents linked to a contact, lists of e-mail messages linked to the contact, associated files linked to a contact, or linked Sales Forecasting information. Data in these fields are filled in automatically and cannot be edited.

Calculated and *Default Value fields* will fill in automatically based on the entry in other fields. A calculated field cannot be edited. Default value fields will offer a suggested entry (a default) when the record is first added which can be changed if necessary

Activity fields are special fields designed to contain information about activities linked to the current record. They generally look like this:  . The prompt usually explains the contents of these fields. These fields fill in automatically based on information from the Activity Manager; they cannot be edited manually.

Start and *Last Revision fields* are used to track when a record was created and when it was last changed. They also track who added and who last edited the record. These fields are not always shown on a contact view, but they can be seen in a browse window. They cannot be edited.

The *RCL* field is used to create a *contact based recall* (as opposed to an *activity based recall*). Rather than scheduling an activity in the Activity Manager for a recall, the RCL field allows you to store the next recall date and time directly in the Contact Manager.

The *LCL* field contains information about the last call placed to a contact using the Dialer feature. It is filled in with the date, time, User ID, and either a + sign (if the call was outbound) or a - sign (if the call was inbound) when a call is terminated.

Validated fields are fields that have been set up to only accept certain information. If you try to make a non-valid entry in a validated field, you will receive a message and be given the opportunity to fix the data. You will not be permitted to enter data that does not meet the validation criteria.

Entering and Editing Text

Most of the data entered into a record will be alphanumeric text typed into character, number, and phone fields. You type text into these fields just as you would into any other Windows text field. The basic keys you use with most word processors (such as CAPS LOCK, BACKSPACE, SPACEBAR, INSERT, DELETE, HOME, END, LEFT ARROW and RIGHT ARROW keys) function within these text fields much as they do on a word processor page.

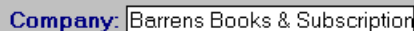
Text fonts and colors are defined for each data field using the Screen Designer. These colors and fonts will apply to all records. You cannot change them for individual records.

To Enter Text:

1. Click in a field. If the field is empty and deselected, the cursor will snap to the beginning of the field. (If there is data in the field already, the cursor will remain exactly where you clicked.)
2. Type your data.

Note: If you make an error, use the BACKSPACE or DELETE keys to remove the text. If you are at the beginning of a field and you backspace, the cursor will move to the previous field. If you continue to backspace, text in that field will be deleted.

If the actual length of the field is greater than the number of characters displayed on the screen, the field will scroll to the left as the display area fills:

A screenshot of a text input field. To the left of the field is the label "Company:" in blue. The text "Barrens Books & Subscription" is entered in the field. The text is truncated on the right side, with a vertical scrollbar visible on the right edge of the field.

Text Field, With Scrollable Text

A screenshot of a text input field. To the left of the field is the label "Company:" in blue. The text "s Books & Subscription Svcs" is entered in the field. The text is truncated on the right side, with a vertical scrollbar visible on the right edge of the field.

Text Field, With Scrolled Text

In memo fields, text will wrap to fit the display area width. When the display area is full, the field will scroll downward:

The screenshot shows a window titled "Investors:". Inside, there is a text area with the text "Seko Group, start-up venture capital, 1977." and "Seko has been in". To the right of the text area are three small square buttons with up, down, and a middle button, used for scrolling the text.

Memo Field, With Wrapped Text; Use Scroll Buttons to Reveal More Data:

3. When complete, press TAB to move the cursor to the next field. (Press CTRL +TAB if you are typing in a Memo field.)

Note: If you are entering text into a field that is included in an index used in duplicate record checking, TeleMagic will check to make sure that the same data that you entered in the field does not exist in this field in any other record. If it does, you will receive a warning.

4. Continue steps 1 through 3 until you have entered all data into the record.
5. To save the data, scroll to a new record or choose **Save**.

To Move between Fields:

- ☞ Click anywhere in the new field.

If the field is empty, the cursor will snap to the beginning of the field. (If there is data in the field already, the cursor will remain exactly where you clicked.)

- ☞ Press TAB. (Use CTRL+TAB for memo fields.)


The cursor will jump to the beginning of the next field in edit order.

- ☞ Press SHIFT+TAB. (Use CTRL+SHIFT+TAB for memo fields.)

The cursor will jump to the beginning of the previous field in edit order.

Saving Changes Made to a Record

To Save Changes Made to a Record:

- ☞ To save current edits, click the Save button  on the Contact Manager Toolbar.

The Save button will turn back to Edit , taking you out of edit mode.

The record is now unlocked and you are free to move on to other records.

Goto


The Contact Manager Goto feature allows you to quickly navigate through TeleMagic. Using Goto, you can:

- ?? Find a record based on information stored in any field;
- ?? Change your filter and index;
- ?? Go to any level, view, or page of the current database;
- ?? Change databases;
- ?? Access your Notebook records;
- ?? Access a marked record;
- ?? Go to the last record added;
- ?? Access a browse list of your pending activities;
- ?? Access a browse list of your contacts.

Using Goto to Navigate the Contact Manager

Rather than having to change levels, select a view, set a filter and index, then step through each page of the level to find the desired page, you can use Goto to go directly to a specified location in your database. The Goto feature allows you to go immediately to any page, view, and level of your database with a specified filter and index already set.

To Navigate through the Contact Manager Using Goto:

1. From the Contact Manager Control Bar, click on the **Goto** button. 
- or** From the **Contact Manager** menu, select **Goto**.

The Goto dialog box will open:



Goto Dialog Box

The options in this dialog box will default to the current settings in the Contact Manager.

Note: The Goto dialog box offers two separate sets of options: buttons on the right take you to specific places in the program; and text fields on the left let you search for more specific information (**Find:** is used to locate specific contact records). The buttons located on the right side of this dialog box do not in any way relate to data selected in the text boxes. Clicking **OK** in the Goto dialog box accepts the settings you specified in the text boxes only.

2. To go to a different level, select it from the **Level:** drop down list.
3. To set an index, select it from the **Index:** drop down list.
4. To set a filter, select it from the **Filter:** drop down list.
5. To change the view you are using, select it from the **View:** drop down list.
6. To go to a specific page, select it from the **Page:** drop down list. This list will contain all pages in the specified level and view.
7. When satisfied with your selections, click **OK**.

The Contact Manager will open to the specified location.

Searching for Specific Records

The quickest way to locate a specific record in TeleMagic is to search for and access that record via the Goto feature. Once you have a piece of information about the record, you can go directly to it. For example, if you want to go to a record for a specific company or contact you can use Goto and avoid scrolling through records until you find the right one.

You will sometimes need to locate a specific contact record based on very little information. You might, for example, know the contact's first name, or know that the company you are

looking for is located in a certain city. While you could create a filter to find such records, using the Goto feature will help you locate them much more quickly.

Goto gives you two different ways of locating a record that contains specific information:

1. A field search based on an index (or multiple indexes) that looks for records that contain specific information in any field for which there is already an index.
2. A field search that looks for records containing specific information in any field, whether or not there is already an index for that field.

Note: Starting a Goto search is not the same as selecting a filter. A quick search does not find *every* record matching the description you give; only the *next* record in the index matching your description. If you need to find all records matching a certain description, you should use the filter feature.

To Find a Specific Record, Based on Data in an Indexed Field:

1. From the Contact Manager Toolbar, click on the **Goto** button. 

The Goto dialog box will open.

The Find: field will default to the data that was last entered in the field (if applicable).

2. Type the data you wish to locate in the Find: text box.

Example: The first name of the contact you are trying to locate is Nels. Type **Nels**.

3. Choose the level you wish to search from the Level: drop down list.

4. Select the index you would like to use in the search from the Index: list. Make sure the index you choose uses the field that contains the data for which you are searching.

Example: You know the contact's first name. Choose **Contact Name:** as the index.

Note: If an index uses multiple fields, only the first one will be used for the search.

- or** If you would like to search through all indexes that have been set up for use with the multiple index search feature, select **Multiple Index Search** from the list of indexes. With this option selected, TeleMagic will search for the information in the index field for every index for which the **Multiple Index Search** checkbox was marked when it was created.

Note: If you select **Multiple Index Search** from the list, it will be offered as a default the next time you access the Goto dialog box.

5. If you would simply like to locate the record, skip to step 9.

6. If you would like to set a particular filter, select that filter from the **Filter:** list. Be aware that if you select a filter that does not contain the record, Goto will not be able to locate it.
7. If you would like to view the record in a particular view, select it from the **View:** list.
8. If you would like to open the record to a particular page, select it from the **Page:** list.
9. When you have defined your search, click **OK**.

The Contact Manager will display the first record that matches your search:

Contact - Nels Petersen at Cascador College Library

contact: Nels Petersen
 Title: CEO
 dear: Nels
 altcon: No

Phone Numbers:
 Office: 207-555-5667
 VMail: 207-555-5665
 cellular: 207-555-3655
 Fax:
 Home:

Notes:
 08/17/2099 3:28p - TST - Out. 0.65,
 Status: Completed - Introduction
 Explained our educational institution
 discounts.

Record History:
 Start: 06/18/96 10:35:29 TST
 Last Revision: -06/18/1996 11:00:55 T9

company: Cascador College Library
 dept:
 custid: DEM9606180094

1st Contact: Not found
 lastcall: Call not found
 Next Call: Call not found

Account:
 Rep: KMK
 Status: Customer

Goto Search Results: Nels Peterson's Record

- or** If no record matches the search, a browse window will display your records. Or, if you are using a multiple search index, you will be returned to the Goto dialog box.


Note: If you have a filter set, you will not go directly to browse. Instead, a message will appear asking if you would like to access browse. If you have a large number of records in the database, it can take a significant amount of time to access a browse window with a filter set. If you choose **Yes** at this message, you will be taken to browse. If you choose **No** at this message, you will be returned to the record from which you accessed Goto.

The browse window will display the closest match to your search criterion.

10. Select a record from the browse window and press ENTER.

The record will open to the specified view and page. The index used in the search will be active, as well as any filter you set.

To Find a Specific Record, Based on Data in a Non-indexed Field:

1. From the Contact Manager Toolbar, click on the **Goto** button. 
or From the **C**ontact Manager menu, select **G**oto.
The Goto dialog box will open.
2. Choose the level to search from the **Level:** drop down list in the Goto dialog box.
3. From the **Filter:** list, select **Field Search**.
The Field Search dialog box will open.
4. From the **Select Field** list, choose the field to be searched.
Example: Product Category:
5. From the **Select Operation** list, choose the appropriate operator.
Example: Equal To
6. In the **Value to Search For** text box, enter the data for which you are searching.
Example: Computer
7. Click **OK** to exit the Field Search dialog box.
The Contact Manager will display the first record that matches your search.

Closing the Contact Manager

You may want to close the Contact Manager without closing TeleMagic. This will free system resources for other tasks without requiring you to log on to TeleMagic when you need to return to the Contact Manager.

To Close the Contact Manager:


-  From the **C**ontact Manager menu, select **C**lose **C**ontact Manager.

PERSONAL CALENDAR

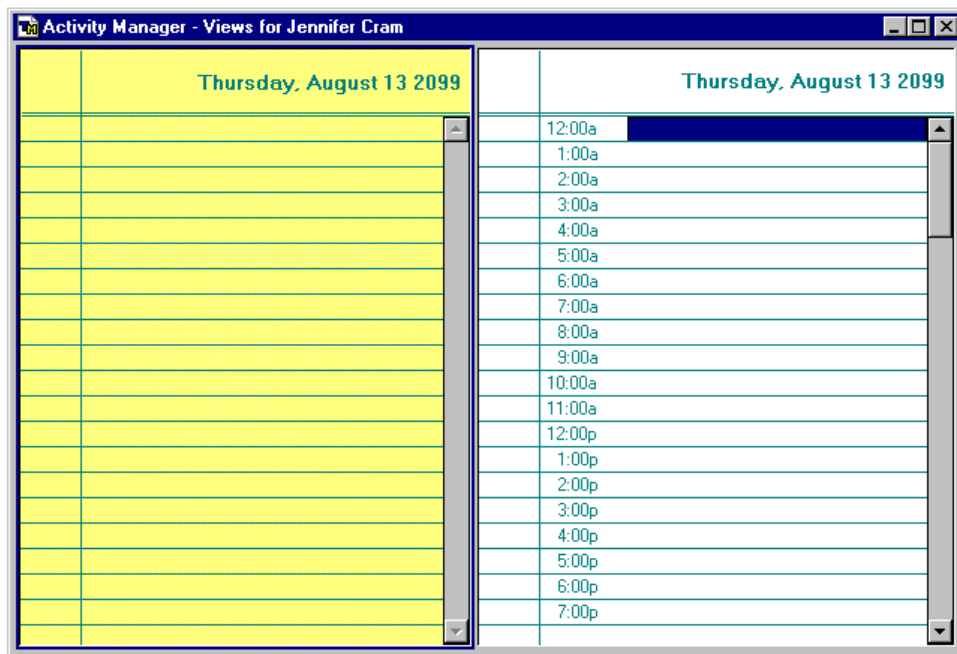
Opening the Activity Manager

TeleMagic includes a fully featured Activity Manager, which is integrated with your Contact Manager for easy contact-related scheduling. The Activity Manager view can consist of one, two, three, or four sections. Each of these sections can contain a different time frame, or feature. For example, you could have your view split into four sections: one contains a Day view showing today. Another could display a Detail view detailing any particular activity for the day. A third could show To-Dos, with the final one showing the current week.

To Start the Activity Manager:

1. On the User Toolbar, click the View your schedule button .
- or From the **Activity** menu, select **View Activities**.

The Activity Manager will open to today's date.



Blank Activity Manager with To-Do and Day Views

The Activity Manager Tools will open:



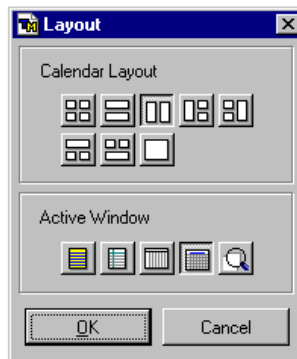
Activity Manager Tools (undocked)

Note: You may toggle the Activity Manager Toolbar on and off by selecting the **Toolbar** option from the **Activity** menu.

To Reconfigure the Activity Manager View:

1. Open the Activity Manager.
2. From the **Activity** menu, select **Layout**.

The Layout dialog box will open.



Layout Tools

3. Click on the button corresponding to your chosen Activity Manager View layout:



Quarter



Horizontal
Split



Vertical
Split



Left
3-way



Right
3-way



Top
3-way



Bottom
3-way



Full

The Activity Manager screen will be configured according to your choice.

Example: If you selected the horizontal split, your calendar view will be divided into two sections, one above the other.

4. Click on one of the sections.

The border of the selected section will be highlighted.

5. Assign a view to the selected section by clicking the desired button:



To-Do



Day View



Week View



Month View



Detail

- or** Right-click on the section that you want to change and select **Current View**. Select the desired view from the secondary menu.

6. Repeat steps 4 and 5 for any remaining sections.

The layout you choose will be retained for future use. The next time you open the Activity Manager, the layout you last used will be displayed.

Activity Scheduling


Events scheduled in the Activity Manager fall into two categories: Activities and To-Dos. Activities are generally specific appointments on a set date and time. For example, you may need to schedule a meeting with a client at 3:00 p.m. on Tuesday. Activities can also take place over several days. When an activity occurs over several days, it is called an Extended Activity. To-Dos are generally events with no set date or time. For example, you may need to prepare the proposed budget for an upcoming project. It does not matter when you do it, as long as it is completed by Thursday. You can set To-Dos to only be displayed on the day that they are due.

Adding To-Dos

Basic Options

To Add a To-Do:


1. Double-click on any blank line in your To-Do View.

- or** Click anywhere on the To-Do View, then click the Add an activity button .


Note: To-Dos are listed first according to priority, if assigned, and then in sequence according to due date within their respective priority groups. Therefore, it does not matter where on the To-Do View you click.

The To-Do dialog box will appear. The To-Do page is open by default:

Sample To-Do Dialog Box

2. Type a description of the To-Do in the **Description:** field. The description you enter will appear on your daily schedule. The description may be up to 50 characters long.
3. Type the due date in the **Date:** field, or click the Date Picker icon  and choose a date from the Go to Date dialog box.
4. The **Direction:** radio buttons can have any meaning you assign to them. Use them to further categorize your To-Do.

Examples: Choose In if the To-Do is an in-house meeting; Out if it is a meeting with a contact; or choose In if the To-Do is a personal item; Out if the To-Do is company business.

5. In the **Type:** field, enter the category of the item you are adding.
- or** Open the list box by right-clicking on the field, or pressing F2, and select a type from the list.
6. You can leave the **Status:** field blank, or type in a user-defined status for the item. (Once you mark the item as completed, the word **Completed** will appear in this field, overwriting any entry you have made.)
7. In the **Priority:** field, click the Priority list arrow  to open the drop-down list and click on your selection. (To-Dos will be organized on the list with Priority 1 To-Dos at the top of the list, followed by Priority 2, then Priority 3.)
8. If you would like the To-Do to appear on your calendar only on the due date and beyond, mark the **Show only when due** checkbox. (This is useful for To-Do items that cannot be completed before the due date.)

or If you would like to be alerted of the To-Do before it is actually due, unmark this checkbox. The To-Do will appear every day on your calendar.

9. Click **OK** to save the To-Do.

or Proceed to the remaining pages to set additional options.

If you did not assign the To-Do item to another user, it will appear on your daily planner with the priority (if assigned) indicated to the left. The To-Do will appear in a black font until the day before it is due, when the font will be blue. On the day it is due, and every day thereafter until the To-Do is completed, the font will be red. Also, after the due date of the To-Do, a box will appear to the right of the To-Do with the number of days overdue indicated.

Linking To-Dos to Records

If the To-Do is related to a contact, such as reviewing a contract for a client, you can link the To-Do to the contact's record in the Contact Manager. You can link any To-Do to any record in any database that you can access. There are five procedures for locating records for linking:

Linking to the Current Record.

?? Linking to Records in the Current Level using Search.

?? Linking to Records in the Current Level using Browse.

?? Linking to Records in Different Levels or Different Databases using Search.

?? Linking to Records in Different Levels or Different Databases using Browse.

To Link a To-Do to the Current Record:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. From the To-Do dialog box, click on the **Link** tab.

The Link page will open.

3. Select the **Current Contact** radio button.

The contact information will be entered in the **Contact Info** field.

4. Click **OK** to save the To-Do.

or Proceed to other pages of the To-Do dialog box to use additional options.

To Link a To-Do to a Record on the Current Level using Search:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. From the To-Do dialog box, click on the **Link** tab.

The Link page will open.

3. Select the **Other Contact...** radio button.

The **Search** field will become available.

4. Enter the search criterion, or the first few characters of the search criterion, of the record to which you want to link the To-Do.
5. Click **Search**.

The To-Do will be linked to the first record matching the search criterion you entered in the **Search** field. If no match is found, you will be given the option of browsing for a record to link the To-Do to.

Note: The basic Search will search records in the current level of the current database. You must have an index established which includes the field containing the search criterion selected, and that index must be set up for Multiple Index Search to use this function. If you have more than one index set up for multiple index search, all will be searched until a match is found. If you do not have an index set up for multiple index search, you will be given the option of browsing for the record you want the To-Do linked to.

6. Click **OK** to save the To-Do.
- or** Proceed to the remaining pages to set additional options.

To Link a To-Do to a Record on the Current Level using Browse:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. From the To-Do dialog box, click on the **Link** tab.


The Link page will open.

3. Select the **Other Contact** radio button.

The search controls will become available.

4. Click **Browse Contacts**.

The Select a Contact dialog box will open. This is a standard browse window listing all records on the current level of the current database.

 **Hint:** This list will be in natural order (the order in which the records were added). To view a sorted list, use the Browse function available from the Advanced Contact Search dialog box. (Click **Advanced Search**, select an index, and click **Browse**.)

5. Scroll through the list of records until you find the desired record.
6. Highlight any field of the record and click **Select**.

The To-Do will be linked to the selected record and the Select a Contact dialog box will close.

7. Click **OK** to save the To-Do.

or Proceed to the remaining pages to set additional options.

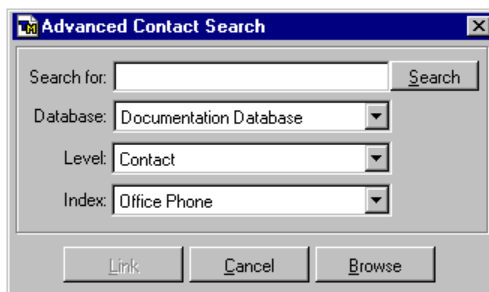
To Link a To-Do to a Record on a Different Level or Database using Search:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. From the To-Do dialog box, click on the **Link** tab.

The Link page will open.

3. Click **Advanced Search**.

The Advanced Contact Search dialog box will open:



The Advanced Contact Search Dialog Box

4. Enter the search criterion in the **Search for:** field.
The **Search** button will become available.
5. Select the database containing the record you are searching for from the **Database:** drop-down list.
6. Select the level containing the record you are searching for from the **Level:** drop-down list.
7. Select an index that includes a field containing your search criterion in its expression from the **Index:** drop-down list.
8. Click **Search** when you are ready to commence searching for the record.

The To-Do will be linked to the first record meeting your search criteria. The Advanced Contact Search dialog box will be closed and the linked contact information will appear in the Contact Info section of the Link page.

9. Click **OK** to save the To-Do.
- or** Proceed to the remaining pages to set additional options.

To Link a To-Do to a Record on a Different Level or Database using Browse:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. From the To-Do dialog box, click on the **Link** tab.
The Link page will open.
3. Click **Advanced Search**.
The Advanced Contact Search dialog box will open.
4. Select the database containing the desired record from the **Database:** drop-down list.
5. Select the level containing the desired record from the **Level:** drop-down list.
6. Choose an index from the **Index:** drop-down list.
7. Click **Browse**.
The Select a Contact dialog box will open. This is a standard browse window listing all of the records in the level (selected in step 5) of the database (selected in step 4) in the order determined by the index (selected in step 6).
8. Scroll through the list until you find the desired record.
9. Highlight any field of the record and click **Select**.
The To-Do will be linked to the selected record and you will be returned to the Activity dialog box.
10. Click **OK** to save the To-Do.
- or** Proceed to the remaining pages to set additional options.

Adding Comments to To-Dos

To add a comment to a To-Do:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. Click on the **Comment** tab.
The Comment page will open
3. (Optional) Click on the **Stamp** button to enter the current date and time, and your user ID.

Note: The **Paste Contact Info** button also inserts the date, time, and user ID. Only one or the other of these buttons should be used.

4. (Optional) If the To-Do is linked to a contact, click on the **Paste Contact Info** button to insert the current date and time, your user ID, and the linked contact's name, address, telephone and fax numbers, and the contents of the Notepad.
 5. If present, edit the stamped or pasted information using standard text processing tools and controls.
 6. Enter the desired message in the field provided. Edit as required using standard text processing tools and features.
 7. Click **OK** to save the To-Do.
- or** Proceed to the remaining pages to set additional options.

Assigning To-Dos to Other Users

You can assign To-Dos to other users in either of 2 ways: you can open the other users calendar and schedule the To-Do as you would on your own calendar, or you can assign the To-Do while viewing your own calendar.

To assign a To-Do to another user:

1. Open the To-Do dialog box for an existing To-Do, or create a new To-Do.
2. From the To-Do dialog box, click on the **Assignment** tab.
The Assignment page will open.
3. Select the Assign to multiple users or groups radio button.
4. Click on the plus sign next to the **All Users** checkbox to open the tree view. Select the user(s) to whom you would like to assign the To-Do by marking their checkbox.

You can assign the To-Do to all users by marking the **All Users** checkbox. When you assign a To-Do to all users in this way, it will be a group To-Do and only the originator of the To-Do will be allowed to edit it. Those to whom the To-Do was assigned will be able to view the To-Do, as they would a Group Activity.

If you (or the user to whom you are assigning the To-Do) are set up to receive Wireless Messages, the **Page Users** checkbox (on the To-Do page) will become available. If you are assigning the To-Do to another user, the **Notify Users** checkbox will become available.


5. To send a wireless message to yourself or the user to whom the activity was assigned, or to send a pop-up message to the user to whom the activity was assigned, click on the **To-Do** tab.

The To-Do page will open.

- or** To proceed without sending notification, skip to step 7.
6. To send yourself or the user to whom the To-Do is assigned a Wireless Message, mark the **Page Users** checkbox.
 7. Mark **Notify Users** for the user to whom the To-Do is being assigned to receive a pop-up notification message concerning the To-Do.
 8. Click on the **Comments** tab.

The Comments page will open.

9. Type any desired notes in the **Comments** box. Click **Stamp** to precede the entry with a date, time, and User ID stamp. (The comment will appear in the Detail view when the To-Do is selected.)

 **Hint:** If you have linked the To-Do to a contact, click **Paste Contact Info** to place the linked contact's name, address, main phone, and fax number in the **Comments** field. If you have linked the contact to a record in another database, you will receive a message informing you of this fact and asking if you would like to continue. If you select **Yes**, the database will be opened, the information will be stamped, then you will be returned to your original database.

10. When you have finished, click **OK**.

If you have selected **Page Users**, the Wireless Messaging dialog box will open.

To assign another user a To-Do to another user on their calendar:

1. Make sure the Activity Manager is open.
2. Select the **Change Activity User** option from the **Activity** menu. A list of users who have granted you access to their calendar will appear.
3. Choose a user to assign the activity to.
4. Click **Select**.
5. Assign them a To-Do the same way you would on your own calendar.

To mark a To-Do as complete:

You can mark To-Dos as complete either by marking their checkbox on the Calendar, or by opening the To-Do dialog box. If you are completing the To-Do for some date other than the current date, you will need to use the latter method.

1. Open the To-Do view in the Activity Manager.
2. Mark the checkbox next to it on the To-Do view of the Activity Manager.

The To-Do will be marked Complete with today's date.

or Double-click on the To-Do.


The To-Do dialog box will open.

3. Mark the **Complete** checkbox and set the date to the actual date the To-Do was completed.
4. Click **OK**.

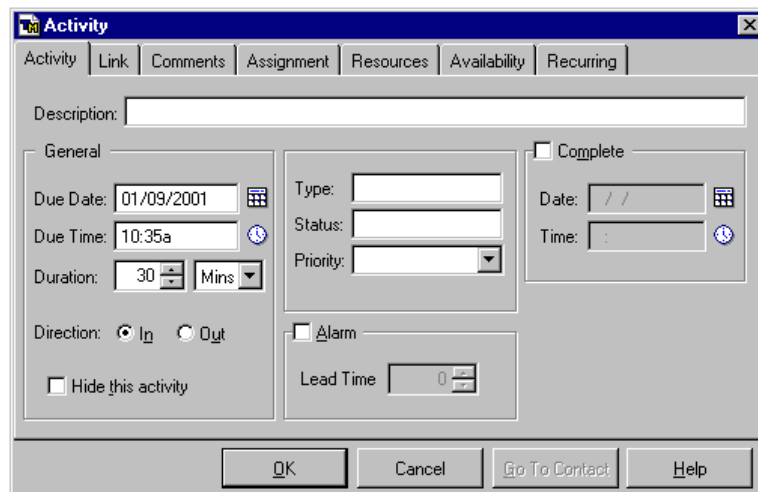
Scheduling Activities, Phone Calls, Appointments, and Meetings

Basic Options

To Schedule an Activity (e.g., a Phone Call or Meeting):


1. In Day or Week view, highlight the appropriate time and click the Add an activity button .
- or** Double-click in your daily schedule on your appointment start time. (If there is already an activity scheduled at the time you double-click, you will be taken to edit mode for that activity.)

The Activity dialog box will appear, the Activity page open by default:



The screenshot shows the 'Activity' dialog box with the 'Activity' tab selected. The 'Description' field is empty. The 'General' section contains fields for 'Due Date' (01/09/2001), 'Due Time' (10:35a), 'Duration' (30 Mins), 'Direction' (radio buttons for In and Out), and a 'Hide this activity' checkbox. The 'Type' field is empty, and the 'Status' and 'Priority' fields are also empty. The 'Complete' checkbox is unchecked, and the 'Date' and 'Time' fields are empty. The 'Alarm' checkbox is unchecked, and the 'Lead Time' field is empty. The 'OK', 'Cancel', 'Go To Contact', and 'Help' buttons are at the bottom.

Activity Dialog Box

2. Type a description of the activity in the **Description:** field. This description will appear on your daily schedule.
3. Type the due date, as required, in the **Due Date:** field of the **General** section. (Type only the numbers: TeleMagic will add the formatting characters for you.)
- or** Click the Date Picker icon  to choose a date from the Go To Date dialog box.
4. Type the due time, as required, in the **Due Time:** field.



If your Display preferences are set to the 12-hour clock, enter the time in the format *h:mm* followed by *a* if before 12:00 noon, or *p* if after 12:00 noon.



Example: 3:00p.

If your Display preferences are set to the 24-hour clock, enter the time in the format *hh:mm*.

Example: 15:00.

Note: If your Display preferences are set to the 12-hour clock, and you type an hour from 0 to 12 without indicating a.m. or p.m., TeleMagic will assume that you mean the *current* 12 hours (i.e., if it is now p.m., TeleMagic will make your time p.m.). However, if you type an hour from 13 to 23, TeleMagic will convert the hour to the corresponding 12-hour clock time, followed by “p” (for p.m.).

- or** Click the Time Picker icon  to select the time from the Go to Time dialog box.
 5. Type the estimated duration (that is, how long this scheduled activity will last) in minutes in the **Duration:** field or click the spinner arrows  and TeleMagic will enter the duration for you.
 6. Select the duration interval from the **Duration:** drop-down list. You can choose minutes, hours, or days.
 7. Use the **Direction:** radio buttons to further categorize your activity.
- Examples:** Choose In if the activity is an in-house meeting; Out if it is a meeting with a contact; or choose In if the activity is a personal item; Out if the Activity is company business.
8. Mark the **Hide this activity** checkbox to prevent the activity from being displayed on the calendar views. The activity will be visible in the Activity Browse view.
 9. Type the activity type (such as meeting, appointment, phone call) in the **Type:** field.
 - or** Open the list box by right-clicking in the field (or pressing F2) and select a type from the list.
 10. You can leave the **Status:** field blank, or type in a status for the item. (If you mark the item as completed, the word **Completed** will appear in this field, overwriting any existing entry.)

11. Click the **Priority:** list arrow  and choose a priority for the activity. (Setting a priority for an activity is for your reference only and will not affect how the activity appears on your schedule. When creating Activity Reports, specific activities can be included based on priority.)
12. Mark **Alarm** to turn on a pop-up alarm to remind you of your scheduled activity.
or Leave **Alarm** unmarked if you do not wish to be alerted when the activity is due.
13. If you have set an alarm, type any desired lead time in minutes (that is, the amount of warning time prior to the scheduled activity) for your alarm in the **Lead Time:** field.
or Click the spinner arrows  and TeleMagic will enter the lead time for you.
14. Click **OK** to save the activity.
or Proceed to the remaining pages to set additional options.

Linking Activities to Contacts

If the Activity is related to a contact, such as phoning or meeting with them, you can link the Activity to the contact's record in the Contact Manager. You can link any Activity to any record in any database, provided you have the appropriate security. There are five procedures for locating records for linking:

Note: If an activity is linked to a contact, you may click the **Go To Contact** button at any time to open the contact record in the Contact Manager.

- ?? Linking to the Current Record.
- ?? Linking to Records in the Current Level using Search.
- ?? Linking to Records in the Current Level using Browse.
- ?? Linking to Records in Different Levels or Different Databases using Search.
- ?? Linking to Records in Different Levels or Different Databases using Browse.

To Link an Activity to the Current Record:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
2. From the Activity dialog box, click on the **Link** tab.
The Link page will open.
3. Select the **Current Contact** radio button.
The contact information will be entered in the **Contact Info** field.
4. Click **OK** to save the Activity.

or Proceed to other pages of the Activity dialog box to use additional options.

To Link an Activity to a Record on the Current Level using Search:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
2. From the Activity dialog box, click on the **Link** tab.
The Link page will open.
3. Select the **Other Contact...** radio button.
The **Search** field will become available.
4. Enter the search criterion, or the first few characters of the search criterion, of the record to which you want to link the Activity.
5. Click **Search**.

The Activity will be linked to the first record matching the search criterion you entered in the **Search** field. If no match is found, you will be given the option of browsing for a record to link the Activity to.

Note: The basic Search will search records in the current level of the current database. You must have an index established which includes the field containing the search criterion selected, and that index must be set up for Multiple Index Search to use this function. If you have more than one index set up for multiple index search, all will be searched until a match is found. If you do not have an index set up for multiple index search, you will be given the option of browsing for the record you want the Activity linked to.


6. Click **OK** to save the Activity.

or Proceed to the remaining pages to set additional options.

To Link an Activity to a Record on the Current Level using Browse:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
2. From the Activity dialog box, click on the **Link** tab.
The Link page will open.
3. Select the **Other Contact** radio button.
The search controls will become available.
4. Click **Browse Contacts**.

The Select a Contact dialog box will open. This is a standard browse window listing all records on the current level of the current database.

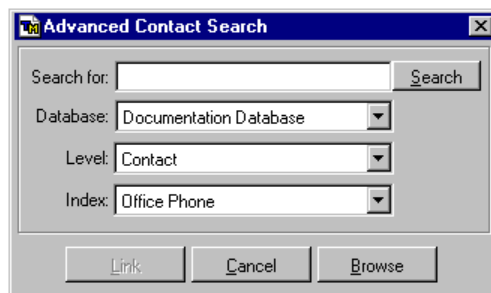
 **Hint:** This list will be in natural order (the order in which the records were added). To view a sorted list, use the Browse function available from the Advanced Contact Search dialog box. (Click **Advanced Search**, select an index, and click **Browse**.)

5. Scroll through the list of records until you find the desired record.
 6. Highlight any field of the record and click **Select**.
The Activity will be linked to the selected record and the Select a Contact dialog box will close.
 7. Click **OK** to save the Activity.
- or** Proceed to the remaining pages to set additional options.

To Link an Activity to a Record on a Different Level or Database using Search:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
2. From the Activity dialog box, click on the **Link** tab.
The Link page will open.
3. Click **Advanced Search**.

The Advanced Contact Search dialog box will open:



The Advanced Contact Search Dialog Box

4. Enter the search criterion in the **Search for:** field.
The **Search** button will become available.
5. Select the database containing the record you are searching for from the **Database:** drop-down list.
6. Select the level containing the record you are searching for from the **Level:** drop-down list.

7. Select an index from the **Index:** drop-down list. The first field in the expression must be the field containing your search criterion.
 8. Click **Search** when you are ready to commence searching for the record.
The Activity will be linked to the first record meeting your search criteria. The Advanced Contact Search dialog box will be closed and the linked contact information will appear in the Contact Info section of the Link page.
 9. Click **OK** to save the Activity.
- or** Proceed to the remaining pages to set additional options.

To Link an Activity to a Record on a Different Level or Database using Browse:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
 2. From the Activity dialog box, click on the **Link** tab.
The Link page will open.
 3. Click **Advanced Search**.
The Advanced Contact Search dialog box will open.
 4. Select the database containing the desired record from the **Database:** drop-down list.
 5. Select the level containing the desired record from the **Level:** drop-down list.
 6. Click **Browse**.
The Select a Contact dialog box will open. This is a standard browse window listing all of the records in the level (selected in step 5) of the database (selected in step 4).
 7. Scroll through the list until you find the desired record.
 8. Highlight any field of the record and click **Select**.
The Activity will be linked to the selected record and the Select a Contact dialog box will close.
 9. Click **OK** to save the Activity.
- or** Proceed to the remaining pages to set additional options.

Adding Comments to Activities

To Add a Comment to an Activity:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
2. Click on the **Comment** tab.

The Comment page will open

3. (optional) Click on the **Stamp** button to enter the current date and time, and your user ID.

Note: The **Paste Contact Info** button also inserts the date, time, and user ID. Only one or the other of these buttons should be used.

4. (optional) If the Activity is linked to a contact, click on the **Paste Contact Info** button to insert the current date and time, your user ID, and the linked contact's name, address, and telephone number.
 5. If present, edit the stamped or pasted information using standard text processing tools and controls.
 6. Enter the desired message in the field provided. Edit as required using standard text processing tools and features.
 7. Click **OK** to save the Activity.
- or** Proceed to the remaining pages to set additional options.


Assigning Activities to Other Users

You can assign activities to other users in either of 2 ways: you can open the other users calendar and schedule the activity as you would on your own calendar, or you can assign the activity while viewing your own calendar using the following procedure. For information on how to view other user's calendars, see the online help or the section on *Assigning To-Dos to Other Users*.

To assign an activity to another user:

1. Open the Activity dialog box for an existing Activity, or create a new Activity.
2. Click on the **Assignment** tab.
The Assignment page will open
3. To assign this activity to a single other user, mark the **Assign to a single user** radio button and choose that user's name from the drop-down list. (Users who have not assigned you scheduling rights to their calendars will not appear on this list.)

- or** To assign an activity to a group or several individuals, mark the **Assign to multiple users or groups** radio button and mark the checkbox associated with the group(s) or user(s) to be assigned the activity. If a user group is selected, all members of the group will be selected by default. If any user is unmarked in one group, he or she will be unmarked anywhere else on the list where they are marked.

Note: To access individual users, click on the plus sign  associated with the group holding the users. The users belonging to the group selected will be displayed in a tree view below the group. The plus sign will change to a minus sign. Clicking on the minus sign will close the tree view.


If any of the selected users have pager information, the **Page Users** checkbox will become available.

4. To page the user(s) being assigned the task, mark **Page Users**.
 5. To send a pop-up notification to the user(s) being assigned the task, mark **Notify Users**.
 6. Click **OK** to save the Activity.
- or** Proceed to the remaining pages to set additional options.

Note: Activities assigned to groups of users can only be changed by the user who originally created them. Other users will only be able to view the activity, add comments, or complete the activity.

Assigning Resources to an Activity

To assign resources to an activity:

1. Open an existing activity for editing, or create a new activity.
 2. Click on the **Resources** tab.
The Resources page will open.
 3. Mark the checkboxes associated with each resource to be allocated to the activity.
Note: Click on the plus sign  to expand the tree and view all of the resources.
 4. Click **OK** to save the Activity.
- or** Proceed to the remaining pages to set additional options.

Checking User and Resource Availability

To determine availability of users and resources:

1. Open an existing activity for editing, or create a new activity.
2. Click on the **Availability** tab.
The Availability page will open.
3. In the **Between Dates** fields, enter the starting and ending dates you want to check for availability. You can either enter the dates directly, or click on the Date Picker icons to open the Go To Date dialog box. (Enter the starting date in the upper field.)
4. In the **Between Times** fields, enter the time frame you want to check for available time slots. You can either enter the times directly, or click on the Time Picker icons to open the Go To Time dialog box. (Enter the starting time in the upper field.)

Note: Only the times you select in this step will be checked for availability. For example, if you wanted to find all available time slots between 1pm and 4pm of the 1st through the 5th of the month, the only time slots listed will be those falling between 1pm and 4pm on those days.

5. Select the combination of users and resources you need to check for availability from the drop-down list.
6. Mark the **View Only Available Slots** checkbox to limit the list to open time slots.
7. Click **Search**.

The time slots selected in steps 3 and 4 will be displayed in the display portion of the page. If you did not mark the **View Only Available Time Slots** checkbox, time slots for users and resources that have already been scheduled will be indicated in red. When resources have been reserved, the user ID of the person who reserved the resource will be indicated.

Recurring Activities

If you have an activity that will recur at a regular interval for some time, you can create a recurring activity rather than a large number of individual activities. You have the option of skipping weekends and holidays, or rescheduling the activity to a nearby day. The description of the final activity in the series indicates that the series is ending.

To assign recurring activities:

1. If you would like this activity to occur at regular intervals (for example, a monthly meeting), click the **Recurring** tab.

The Recurring page will open.

2. From the **Frequency** list, select the desired interval to repeat the activity. The available choices will depend, in part, on when the first instance of the activity is scheduled. For example, if the first instance of the activity falls on the fourth Wednesday of the month, your choices would include Every Wednesday, Every other Wednesday, The Fourth Wednesday of Every Month, among others.
3. When you have chosen a frequency, other than Does Not Recur, the **Duration** drop-down list will become available. From this list, select the period over which the activity will occur. The available choices will depend on the Frequency selected in step 2.
4. If you chose User Defined in step 3, the Duration date field will become available. Enter the date after which the activity should no longer be scheduled. You can either enter the date directly, or click on the Date Picker icon to open the Go To Date dialog box and select the final date of the activity from the calendar.
5. In the upper portion of the Conflict Resolution group, select how you would like conflicts to be resolved when they arise:
 - ?? Schedule regardless of conflict
 - ?? Skip this activity when conflicting
 - ?? Schedule before conflicting activity.
 - ?? Schedule after conflicting activity.
6. In the lower portion of the Conflict Resolution group, select how you would like the recurring activity to be scheduled when it falls on a weekend or holiday.

Note: Conflict resolution may not be relevant to activities which are scheduled daily.

 - ?? Schedule on weekends and holidays
 - ?? Skip weekends and holidays
 - ?? Move activity to nearest workday
7. Choose **OK** to save the activity, or open another page to further refine the activity.

Viewing Activities & To-Dos

The Activity Manager provides 5 different views of your calendar. You can display up to four different views at a time in any of eight configurations. When displaying more than one view, only one view will be active. A highlighted border indicates the active view. To make a view active, click anywhere on the view.

Note: When a change is made to the Contact Manager, the Activity Manager is automatically updated with the change. A **Refresh** option has been added to the **Activity** menu which will update the calendar when this option is selected.

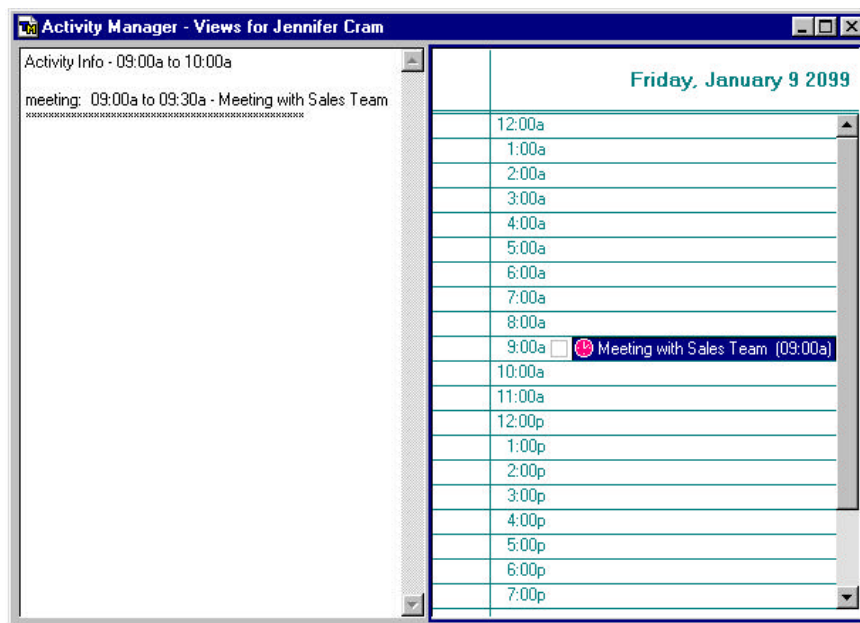
The Day View

The default configuration for the Activity Manager is a split-screen with a To-Do View on the left and a Day View on the right. If you have changed your Activity Manager layout and no longer have the Day View displayed, you can open the Day View by selecting a frame,



and clicking the Day View button.



You can arrange your Activity Manager view in a variety of ways. In the following example, a user has a Detail view on the left-hand side of the page; and several scheduled meetings, phone calls, and deadlines listed in Day View format on the right-hand side of the page:



Sample Activity Manager, Detail View and Day View

Each scheduled activity will appear on the calendar with the description provided when the activity was created or last modified. Activities will appear on the day and time slot on which they were scheduled. If an activity extends over more than one time slot, the entire duration will be highlighted. The actual time for the activity will be indicated in parentheses to the right of the description. A checkbox will be associated with each activity. If the checkbox is marked, the activity is complete. Click on the checkbox to mark the activity as complete. (Activities can also be marked as complete from the Activity dialog box.)

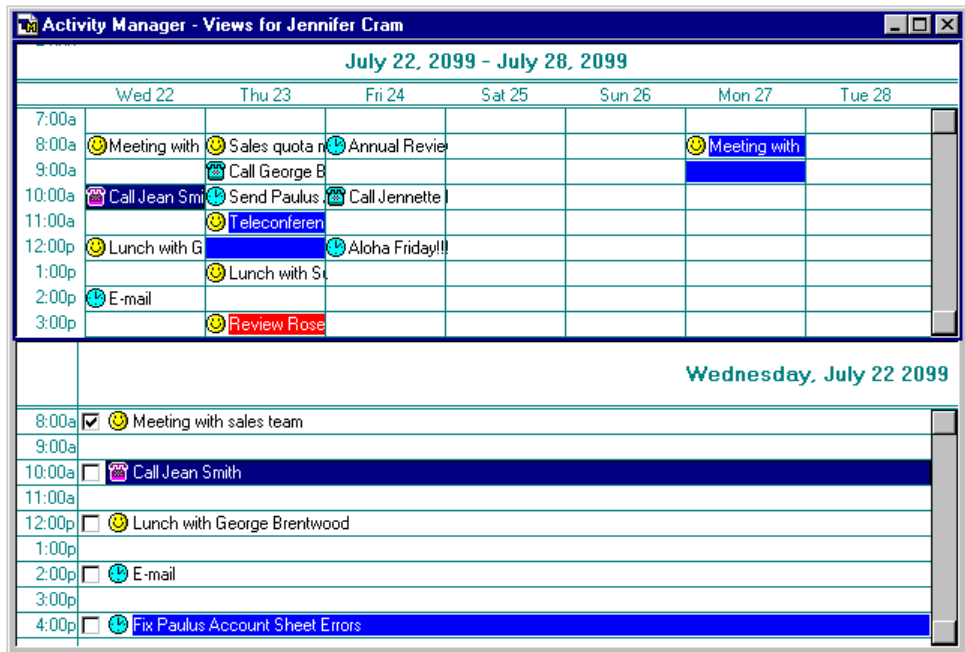
Navigate through Day View using the following guidelines:

- ?? Press UP ARROW or DOWN ARROW, or use the scroll bar, to see earlier or later times in the current day.
- ?? Press the RIGHT ARROW or LEFT ARROW keys to move through the calendar 1 day at a time.
- ?? Click on the Go To Time button  to open the Go To Time dialog box and move directly to a particular time.
- ?? Press the ALT + RIGHT ARROW or ALT + LEFT ARROW keys, or click on the left and right arrow buttons (on the Activity Manager Toolbar) to flip through your day planner one day at a time.
- ?? Click on the Go To Date button  to open the Go To Date dialog box and go to a particular date.
- ?? Double-click on the on the date at the top of the view to open the Go To Date dialog box and go directly to a particular date.
- ?? Press the PAGE UP and PAGE DOWN keys to go to the top or bottom of the currently displayed times. If already at the top or bottom, pressing these buttons will select an hour 1 display length away in the chosen direction. The precise number of slots that the highlight will move varies with the height of the Day View.
- ?? Click on a particular hour to select it.

The Week View

The Week View displays seven days. When first opened, the days displayed will begin with the current day.



In the following example, the user has chosen to display the Week View and the Day View together in a half-screen horizontal split. This layout allows the user to see more of the activities' descriptions on the Week View than would be visible in a vertical split.



Sample Activity Manager Week and Day Views


In the week view, as in the Day View, if an activity extends across multiple time slots the subsequent time slots will be highlighted. Each column represents a day of the week; each row is one time slot.

Navigate through Week at a Time view using the following guidelines:

- ?? Press UP ARROW or DOWN ARROW to see earlier or later times in the current day.
- ?? Press the RIGHT ARROW or LEFT ARROW keys to move through the calendar 1 day at a time.
- ?? Click on the Go To Time button  to open the Go To Time dialog box and move directly to a particular time.
- ?? Press the ALT + RIGHT ARROW or ALT + LEFT ARROW keys, or click on the left and right arrow buttons (on the Activity Manager toolbar) to flip through your week planner one week at a time.
- ?? Click on the Go To Date button  to open the Go To Date dialog box and go to a particular date.
- ?? Double-click on the top row of the view (the one containing the date range) to open the Go To Date dialog box and go directly to a particular date.

- ?? Press the PAGE UP and PAGE DOWN keys to go to the top or bottom of the currently displayed times. If already at the top or bottom, pressing these buttons will select an hour 1 display length away in the chosen direction. The precise number of slots that the highlight will move varies with the height of the Week View.
- ?? Click on a particular hour to select it.

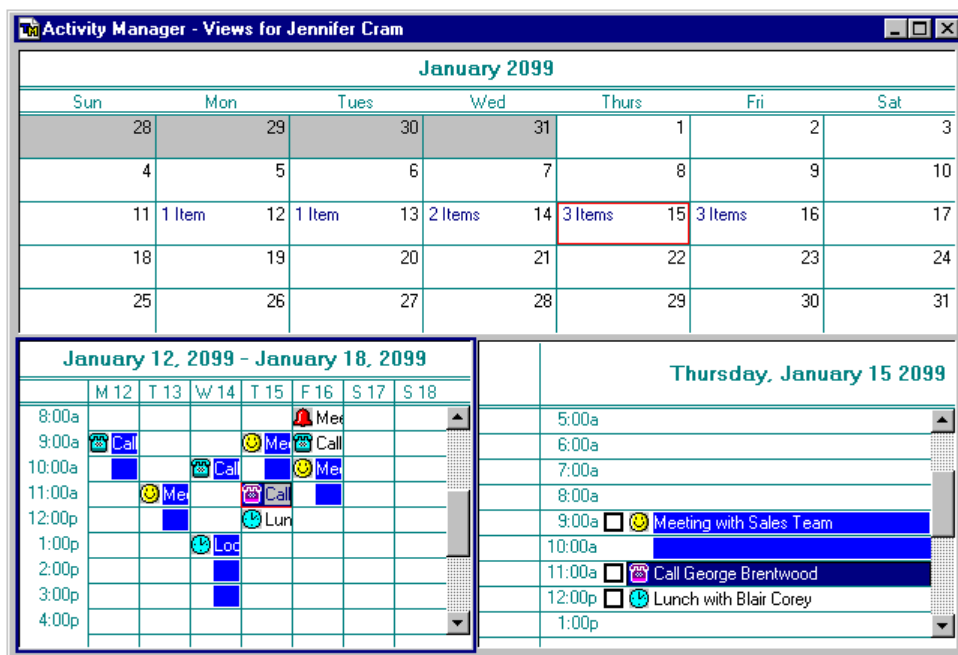
The Month View

The Month View displays five calendar weeks at a time. Selecting the Show Month Only button  will cause the calendar to always display a complete month. When scrolling through the weeks, the view will move forward or backward enough that a full month is always showing. When this option is selected, days that are not in the full month will be gray. If a gray-colored date is selected, the month it belongs to will become the current month and the calendar will be adjusted accordingly. When this option is not selected, all days will be white and the calendar will advance one week at a time when scrolling through the weeks.

One date in the view is highlighted. The highlighted date is selected and activities on that date can be edited. If Show Month Only is selected, the month containing the highlighted date will be displayed in white, while days not in the same month will be displayed in gray. If Show Month Only is not selected, all dates will be displayed in white.


The number of activities on each day is indicated. Extended activities (activities extending over more than one day) are indicated by colored bars.

In the following example, the user has chosen to display Month, Week, and Day views in a 3-way split layout. There is an extended activity starting on Monday the 20th and ending on Thursday the 23rd.



Sample Activity Manager Month, Week, and Day Views

Navigate through Month at a Time view using the following guidelines:

- ?? Press the RIGHT ARROW or LEFT ARROW keys to flip through your day planner one day at a time.
- ?? Press UP ARROW or DOWN ARROW to move through the view one week at a time. If Show Month Only is not selected, the view will advance one week whenever either of these buttons is clicked. With Show Month Only selected, the view will advance as required to display an entire month.
- ?? Click on the Go To Date button  to open the Go To Date dialog box and go to a particular date.
- ?? Double-click on the top row of the view (the one containing the month and year) to open the Go To Date dialog box and go directly to a particular date.
- ?? Press the PAGE UP and PAGE DOWN keys, or click on the left and right arrow buttons (on the Activity Manager toolbar), or press ALT + RIGHT ARROW or ALT + LEFT ARROW to go to the next or previous month. TeleMagic will attempt to select the day with the same date, but if you move to a month that does not have a day with the same date, the last day of the newly displayed month will be chosen. For example, if you have August 31 selected and press page down, September 30 will be selected.

?? Click on a day to go directly to it.

The Month view displays an indication of how many activities are scheduled for each day.


The To-Do View

To-Dos are activities that do not necessarily happen at a particular time, but are due by a particular time. To-Dos can have a priority of 1, 2, 3, or no priority. The To-Do's priority will determine its place on the list of To-Dos. To-Dos can be set to display only on the day they are due. This is useful when an activity must be done on a particular day, and can be done at any time on that day, but cannot be done before that day. When this option is selected, the To-Do will appear on the calendar on the day it is due and every day thereafter, until marked complete. Otherwise, To-Dos will appear on the To-Do View every day until they are marked completed.

To-Dos are arranged on the list of To-Dos in order of assigned priority (1 at the top, no priority at the bottom) and date. That is, a To-Do of priority 1 will be listed above a To-Do of priority 2, regardless of date. But, of two To-Dos of equal priority, the one due soonest will be listed first. A To-Do's priority, if any, is indicated to its left.

To-Dos will be in black font until the day before they are due, at which point they will be shown in blue font. On the day they become due, To-Dos are displayed in red. When a To-Do is overdue, it will be listed in red with an indicator to its right showing the how far past due it is, in days.

To display the To-Do View:


- ☞ With the Activity Manager open, select a section of the Activity Manager screen to hold the To-Do View, open the **Activity** menu, select **Layout**, and click the To-Do View button .
- or Right-click on the frame where you want the To-Do view to be displayed, select **Current View**, and select **To-Do View** from the secondary menu.

The To-Do-View will open in the selected section of the Activity Manager.

The Detail View

The Detail View augments the Day View and To-Do View by providing a display showing all details related to an activity or To-Do.

To open the Detail View:

- ☞ With the Activity Manager open, select a section of the Activity Manager screen to hold the To-Do View, open the **Activity** menu, select **Layout**, and click the Detail View button .

- or Right-click on the frame where you want the To-Do view to be displayed, select **Current View**, and select **Detail View** from the secondary menu.


The selected section of the Activity Manager will display the Detail View.


The highlighted activity or To-Do will have its details displayed in the Detail View. If no activity or To-Do is highlighted, the Detail view will be blank.

Working with the Calendar Views

Icons next to the activities on the calendar show scheduled activity types at-a-glance:

- ?? The happy face 😊 indicates a meeting.
- ?? The telephone 📞 indicates a scheduled phone call.
- ?? A clock face 🕒 indicates any other type of appointment.
- ?? A bell 🔔 indicates an alarm.

 **Hint:** You can change the icons used to represent each activity type, and create new activity types with their own icons. To customize icons, open the **Activity** menu and select **Customize Icons**. This will open the Activity Icons dialog box where you can make the desired changes. You can use the icons supplied with TeleMagic, or you can design your own. If you wish to use your own icons, they must be in bitmap (.BMP) format, no larger than 13x13 pixels, and 16 colors.

- ?? A plus sign (⊕) marks multiple items in the same time slot (only applicable in the Day at a Time and Week at a Time views). If you click on a plus sign, a pop-up menu of the activities in that time slot will appear. Click on one of the activities to open it for editing.
- ?? A colored bar  indicates an extended activity like a trip or a conference. You can have as many extended activities as you like, but only as many as will fit in your resolution will be displayed. The description in the bar will be included if the bar is large enough to accommodate it. All extended activities will be displayed in the Detail view, even if they are not displayed in the Month View.
- ?? Checkboxes ☐ at the left of each entry show whether or not a task is completed. An empty checkbox indicates a pending activity or To-Do. A marked checkbox ☒ indicates the activity or To-Do is completed. Checkboxes do not appear in the Month or Week Views.

Going to a Specific Date or Time

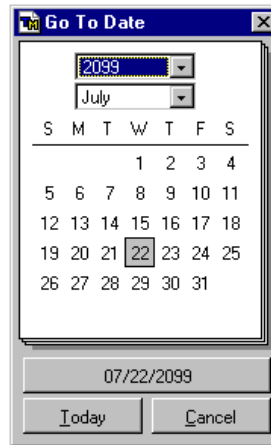
Navigating through the calendar is facilitated with the ability to go to a specific date in any view, or a specific time in Day or Week views.

To Go to a Specific Date:

☞ Click the To Date button .

or Double-click on the top row of the Day, Week, Month, or To-Do View.

The Go To Date dialog box will appear:



Sample Go To Date Dialog Box

☞ Click **T**oday to bring up the daily schedule for today's date.

or


1. Select the year from the drop-down list at the top of the calendar.
2. Select the month from the drop-down list immediately beneath the year drop-down list.
3. Click on a specific date to select that date.

A box will appear around the date you have selected. The date on the date button at the bottom of the dialog box will change accordingly.

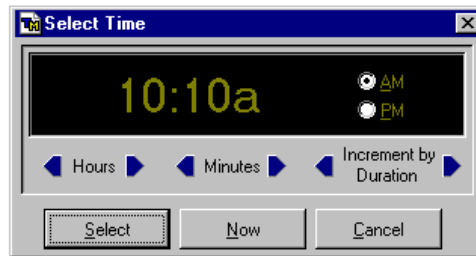
4. Click the date button to bring up the calendar page for that date.

Note: If you use the Go to Date dialog box from the Month at a Time screen, TeleMagic will open to the month containing the chosen date. A box will appear around the selected date.

To Go to a Specific Time:

1. Click the To Time button . (This button will only be available when either the Week or Day View is active.)

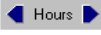

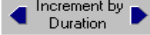
The Select Time dialog box will appear:



Sample Select Time Dialog Box

2. Use the AM and PM radio buttons to toggle between morning and afternoon.

Note: If your Display Preferences are set to use 24 hour time, these radio buttons are not present.

3. Click on the Hours scroll arrows  to adjust the hour of the time displayed. To scroll quickly through the hours, hold down the scroll arrow.
4. Click on the Minutes scroll arrows  to adjust the minutes of the time displayed. To scroll quickly through the minutes, hold down the scroll arrow.
5. Click on the Increment by Duration scroll arrows  to adjust the time setting based on the Default Activity Duration setting in Activity preferences.
6. Click **Select** to go to the time displayed in the window.


Note: Depending on the settings in Activity preferences, if the actual time is not one that is shown on the daily schedule, you will be moved to the time shown which is closest.

- or** Click **Now** to go the current system time.

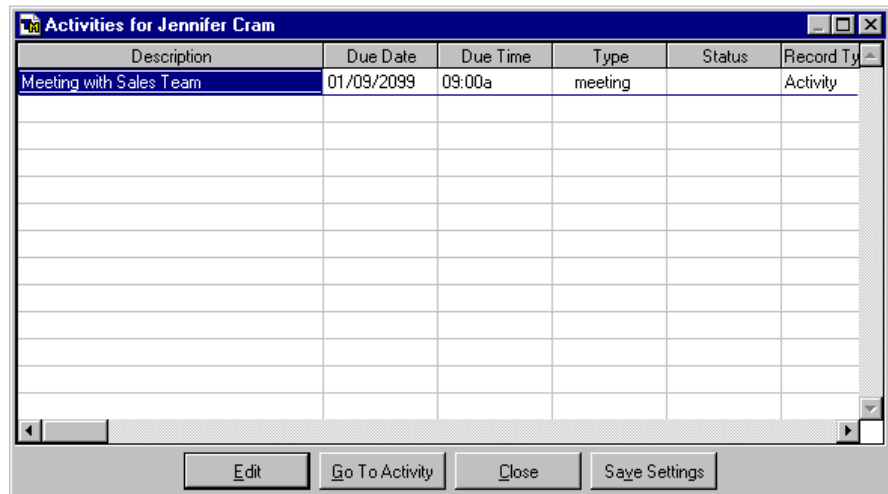
Activity Manager Browse

Another way to view activities and To-Dos is to go into activity browse mode. The Activity Manager's activity browse mode allows you to see, in tabular format, a list of all your activities and To-Dos, both pending and completed.

To Browse through a List of To-Dos and Activities:

1. Click the Activity Manager's **Browse** button .
- or From the Contact Manager, select **Browse** from the **Activity** menu.

The browse window will open, showing all To-Dos and activities in order by date, starting with the current date, or the next date that contains an activity:



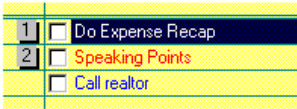
Activity Manager Browse Window


2. Use the following guidelines to view your activities:
 - ??To see fields and data that currently are not showing in the window, use the scroll bars.
 - ??To edit an item on the list, highlight it and click **Edit**, or double-click on the item. The Activity or To-Do dialog box will open.
 - ??To go to the calendar page containing an item, highlight the item and click **Go to Activity**. Browse will close and you will be on the appropriate page in the selected view. (If you have accessed browse from the Contact Manager, the Activity Manager will open to the last layout you had open.)

??To exit browse and return to the page you were previously viewing, click **Close**.

Viewing and Editing Existing Activities and To-Dos

To See Full Details of a To-Do or Activity:



- 1. In day or week view, double-click the Scheduled Activity, or highlight the item and click Edit the current activity .
- or In To-Do View double click the To-Do, or highlight the To-Do and click Edit the current activity.

The related To-Do or Activity dialog box will open:

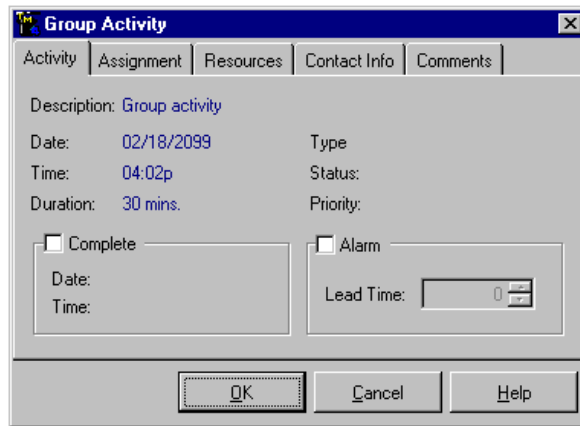
A screenshot of the 'Activity' dialog box. The dialog box has a title bar 'Activity' and several tabs: 'Activity', 'Link', 'Comments', 'Assignment', 'Resources', 'Availability', and 'Recurring'. The 'Activity' tab is selected. The 'Description' field contains 'Call Jean Smith'. The 'General' section has fields for 'Date' (07/22/2099), 'Time' (10:00a), 'Duration' (30), 'Direction' (radio buttons for 'In' and 'Out'), and a checkbox for 'Hide this activity'. The 'Type' dropdown is set to 'Call'. The 'Status' and 'Priority' dropdowns are empty. The 'Complete' section has a checkbox for 'Complete', 'Date' (/ /), and 'Time' (:). The 'Alarm' section has a checkbox for 'Alarm' and a 'Lead Time' field (0). At the bottom are 'OK', 'Cancel', and 'Help' buttons.

Sample Activity Dialog Box

- 2. Make the required changes in the activity.

Note: An activity can only be edited by one user at a time.

Note: Activities assigned to groups of users can only be changed by the user who originally created them. Other users will only be able to view the activity, add comments, or complete the activity.



The image shows a 'Group Activity' dialog box with a blue title bar and a close button. It has five tabs: 'Activity', 'Assignment', 'Resources', 'Contact Info', and 'Comments'. The 'Activity' tab is selected. The dialog contains the following fields and controls:


- Description: Group activity
- Date: 02/18/2099
- Time: 04:02p
- Duration: 30 mins.
- Type: (empty)
- Status: (empty)
- Priority: (empty)
- ☐ Complete
- ☐ Alarm
- Date: (empty)
- Time: (empty)
- Lead Time: 0 (with a small calendar icon)

At the bottom are three buttons: 'OK', 'Cancel', and 'Help'.

Group Activity Edit Dialog Box

Re-Prioritizing, Completing, and Deleting Activities and To-Dos

To Delete an Activity or To-Do:

- ☞ Click the item, then click the Delete the current activity button .
- or Highlight the item and press the DELETE key.

A message will appear asking if you are sure you want to delete the activity or To-Do. Select **Yes** to delete it.

To Mark an Activity or To-Do as Completed:

- ☞ Click once in the checkbox ☐ beside the To-Do or Activity. The checkbox will display a check mark: ☒. This will record the To-Do as complete on the current day. This option is available for Activities only on the Week view.

or


1. If you want to mark the Activity or To-Do as complete on a day other than today double click on the To-Do or Activity. If you are working from the Month view, Activities and To-Dos are not specifically listed. Double-click on the blue text indicating that there are activities (e.g. 2 Items). This will open a list of all activities and To-Dos for that day. Select the activity that you want to complete and continue.

The To-Do or Activity dialog box will open.

2. Mark the **Complete** checkbox on the Activity page (for Activities) or the To-Do page (for To-Dos).
3. Enter the date that the Activity or To-Do was completed in the **Date** field located in the **Complete** group.
4. If you are completing an Activity, enter the time that the Activity was actually completed in the **Time** field located in the **Complete** group. This step does not apply to To-Dos.
5. Click **OK**.

The Activity or To-Do dialog box will close.


To Reschedule an Activity:

-  Reschedule any Activity by dragging it to a new time slot on either the Day or Week view.


Note: If you drag an activity for a group or which uses resources to a time that creates a conflict with the group members or resources, you will receive a notification of the scheduling conflict. Consider editing the activity and searching availability to find an alternative time slot.

Note: A plus mark (+) indicates when there are multiple activities scheduled at the same time. If you attempt to drag an activity with a plus mark, when you release the mouse button, a dialog box will appear where you can highlight the activity you would like to reschedule and click **Select**. If you click on a plus mark, a floating menu will open listing all of the Activities scheduled for that time slot. You can select the Activity from this menu and open the Activity dialog box, and change the scheduled time there.

or

1. Open the Activity dialog box by double-clicking the activity or highlighting it and clicking the Edit the current activity button .
2. In the **Date:** and **Time:** fields, type the new schedule details.
3. Choose **OK** to return to the calendar.

To Re-order and Re-prioritize a To-Do:

1. Open the To-Do View and double-click on the To-Do to be changed.
- or** Highlight the To-Do to be changed and click on the Edit the current activity button .
2. Edit the priority and date as required.
The list will be re-ordered. The priority numbers will be adjusted.

E-MAIL



TeleMagic Internet Mail

TeleMagic's e-mail system is designed to give you the power and versatility necessary in a world where instant communication is essential and expected.

TeleMagic's e-mail allows you to quickly communicate with other members of your workgroup, and with millions of users on the Internet. Among other features, you can send and receive multiple attachments, and to organize incoming and outgoing mail for the most efficient and appropriate handling. You can link e-mail messages to your contacts, and use TeleMagic's Merge feature to produce targeted mass mailings. The address book keeps your user list up-to-date automatically and your Internet contacts organized.

TeleMagic e-mail can be run from within TeleMagic, or as a standalone application. You may also use Microsoft Outlook with TeleMagic for even more flexibility. In order to use some Internet Mail features, you need to be logged on to your Enterprise installation. You do not need to run Enterprise in order to be logged on, and it is possible to have Enterprise running and not be logged on with Internet Mail.

To run TeleMagic E-mail from within TeleMagic Enterprise:

 Click the e-mail button on the TeleMagic toolbar .

or From the **Office** menu, select **TeleMagic Email**.

To run TeleMagic E-mail independently:

1. From the Taskbar, click **Start, Run**.
The Run dialog box will open.
 2. Enter the complete path and filename (\PROGRAMS\TMMAIL.EXE) in the text window.
- or** Find the file using the Browse function.

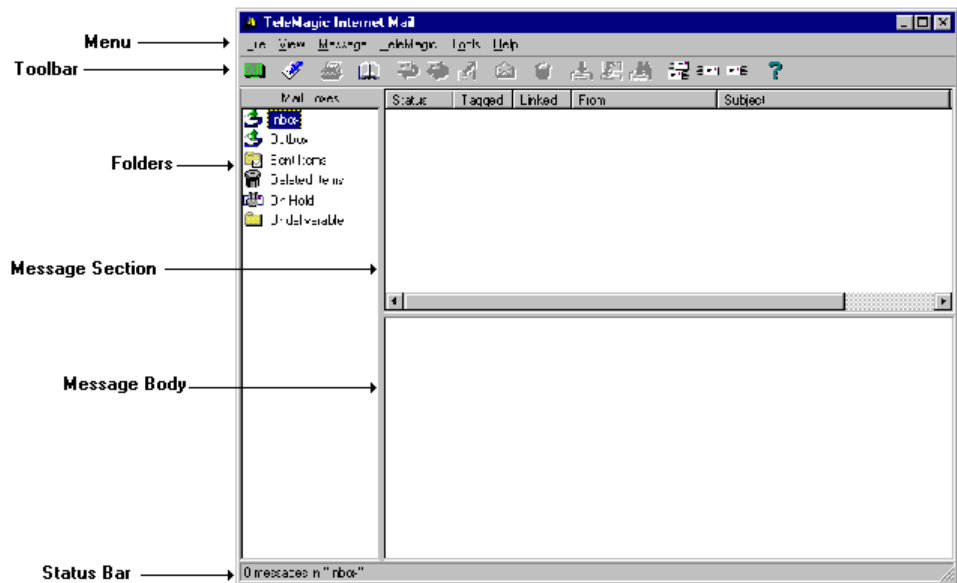
To run TeleMagic Features from Microsoft Outlook:

1. Double-click the Outlook icon.
- or** Find the file using the Browse function.
2. Open a new message.

Note: Please see *Setting Up TeleMagic in Microsoft Outlook* later in the chapter to address how to configure Microsoft Outlook if it does not immediately integrate with TeleMagic Enterprise, which it should.

TeleMagic Internet Mail Main Screen

When you open the TeleMagic e-mail system, you will see the TeleMagic logo screen, followed by the logon screen. If this is the first time you log on with this user, you will need to establish a mailbox. Creating a mailbox consists of following a wizard which will determine where to store your mail, your name and password, whether to log on to TeleMagic when you start Internet Mail, and your TeleMagic logon information. When TeleMagic Internet mail logs on to TeleMagic, it does not open TeleMagic. Logging on to TeleMagic allows TeleMagic Internet Mail to perform certain functions such as linking incoming messages to contacts.



E-Mail Main Screen with Message Body Section Open

Use this screen as the starting point for everything you want to do with TeleMagic E-Mail.

- ?? The vertical box on the left lists the various mailboxes where your e-mail is stored. The Folders shown are the defaults and cannot be removed. You can add more Folders as required.
- ?? The horizontal box on the top will list all the messages in the selected folder.
- ?? The horizontal box on the bottom will display the text of the selected message. This section is not opened by default.

Adjust the size of the three areas using the cursor to drag the border to its desired position.

Toolbar

When you place your cursor on one of the toolbar buttons, a ToolTip will appear to tell you exactly what that button does.

From the toolbar, you can print messages; reply to one or all recipients; forward messages; delete messages; access your TeleMagic databases (if you are running the program from within TeleMagic), among other options.

New messages are created in the New Message window. This window has its own toolbar which provides functions specific to creating and editing messages, such as linking to contacts, spell checking, sending, and archiving.

Setting up TeleMagic Internet Mail

Before you can use TeleMagic Internet Mail you will need to establish a mailbox. You can have as many mailboxes as necessary for external logons. When logging in from TeleMagic, your TeleMagic user ID will be used automatically.

To establish a user mailbox:

1. Open TeleMagic Internet Mail. When the Logon box opens, enter the User ID in the Mailbox field.

If this mailbox has not been established, TeleMagic Internet Mail will prompt you to create a new mailbox. Click **Yes** to continue.

2. The TeleMagic Internet Mail Mailbox dialog box will open.

A location to store the mail for this mailbox will be suggested in the **Enter the location to store your mail** field. To change the suggested location, enter the desired location in the field, or click on the **Modify** button and select the desired directory using the Select Directory dialog box. When satisfied with the location, click **Next** to continue.

The TeleMagic Installation page will open.

3. Select the **Log on to TeleMagic** radio button to determine how TeleMagic Internet Mail will work with TeleMagic Enterprise.

Note: You must be logged on to TeleMagic Enterprise to be able to use some features of TeleMagic Internet Mail, such as Link to Contact and Contact Lookup.

4. Verify that the suggested location for TeleMagic Enterprise is correct in the **Enter the Location of your TeleMagic Installation:** field. If it is not correct, enter the correct location in the field, or click **Modify** and browse for the correct directory.

5. Enter your TeleMagic user ID in the **UserID:** field. If you leave this blank, you will be prompted for login information whenever TeleMagic Internet Mail connects to TeleMagic.
6. Enter your TeleMagic password in the **Password** field.
7. When satisfied with your TeleMagic information, click **Finish**.

The TeleMagic Internet Mail Account Setup wizard will open. Since you will be able to establish as many e-mail accounts as necessary for each mailbox, the procedure for doing so is presented separately.

Setting up TeleMagic Features in Microsoft Outlook

Note: For some TeleMagic features to work in Microsoft Outlook, such as merge fields, you must be logged in to TeleMagic Enterprise.

Microsoft Outlook can now integrate TeleMagic features thanks to its API function. In most cases, this should happen automatically upon installation of TeleMagic. However, there may be occasions when this does not happen, or you may want to disable the TeleMagic features in Outlook. If this is the case, you must go into Microsoft Outlook and adjust the setting.

To enable/disable TeleMagic integration with Microsoft Outlook:

1. Open Microsoft Outlook.
2. Select **Options** from the **Tools** menu.
The Options dialog box will open.
3. Click the **Other** tab.
The Other page will open.
4. Click the **Advanced Options...** button. When this screen opens, click on the **COM Add-Ins** button.
The COM Add-Ins selection box will open.
5. Mark the check box in front of the option **TeleMagic Enterprise Mail Addin for Microsoft Outlook** if it is not already checked to enable TeleMagic integration. To disable TeleMagic integration, unmark the check box.
6. Click **OK**.

Microsoft Outlook should now be ready to use with TeleMagic.

WARNING! TeleMagic cannot integrate with Microsoft Outlook if the optional security patch is installed, or if Microsoft Word is Microsoft Outlook's default e-mail editor. To use Microsoft Outlook with TeleMagic, both of these options must be disabled.

To Set Database Preferences for Microsoft Outlook in TeleMagic:

1. Go to the Database page in Preferences...
2. Click the **Outlook E-Mail Link Setup** button.
The Outlook E-Mail Settings dialog box will open.
3. Mark the Sstamp notepad when sending E-Mail checkbox to have the notepad automatically marked with the Date, Time, and User ID when an e-mail is sent from Outlook. Once this checkbox is marked, more options will become available. You may also choose to have User Name, Subject, Message Body, and Attachments stamped on the notepad by marking their respective checkboxes.
4. You may create a completed activity from a sent e-mail if you mark the **Create Activity when sending E-mail** checkbox. It will then be listed on your calendar.
5. To add the sent e-mail to a roll-up list, mark the **Add sent mail to E-Mail Rollup** checkbox.

Click **OK** when you have finished setting your Outlook e-mail preferences. You will return to the Database Preferences screen.

Establishing a New E-mail Account

You must establish at least one e-mail account to be able to send and receive Internet e-mail. You will not need to establish an e-mail account to send and receive TeleMagic e-mail. To send and receive TeleMagic e-mail, you only need to be logged on to TeleMagic or your MAPI server. If you do not establish an e-mail account, you will be able to send Internet mail through MAPI, but not receive. TeleMagic Internet Mail allows you to establish as many e-mail accounts as you like. There are a number of reasons for establishing multiple e-mail accounts for one user mailbox:

- ?? To distinguish among correspondence with your customers, suppliers, and other members of your organization.
- ?? To accommodate using different ISPs or connections.
- ?? To provide access to your e-mail from a computer using a different mail server than the one you normally use for mail. For checking the mail in your personal account from your work computer, for example.

The Internet Account Wizard will guide you through the process. This wizard launches automatically when you first create a new mailbox externally. To add a new account to an existing mailbox, you must first open this wizard.

To open the Internet Account Wizard:

1. Open TeleMagic Internet Mail.

2. From the **Tools** menu, select **Options**.
The Preferences dialog box will open.
3. Click on the **Servers** tab.
The Servers page will open.
4. Click **New**.
The TeleMagic Internet Mail Account Setup wizard will open.

To establish a new e-mail account:

Note: This procedure assumes that you have already opened TeleMagic Internet Mail and are either establishing a new user mailbox or are adding a new e-mail account to an existing user mailbox. In either case, you need to have the TeleMagic Internet Mail Account Wizard open to its first page before proceeding.

1. In the **Description** field, enter a name for this account. The description entered here will appear in any lists of your e-mail accounts.
2. Mark the **Make this my default account** checkbox if you want this to be your principal e-mail account. The POP3 server, and associated information, for this account will be used for all outgoing mail. This checkbox is marked by default for the first account established for the current mailbox.
3. When satisfied with the items on this page, click **Next**.
The Send page will open.
4. In the **I am known as:** field, enter the name you would like to appear in the **From** field on mail you send.
5. Enter your e-mail address for this account in the **E-mail Address:** field.
6. Enter the name of your SMTP server in the **SMTP Server:** field. This information will be available from your network administrator or ISP.
7. Enter the SMTP port in the **SMTP Port:** field, if different from 25.
Warning! This setting should only be changed by the network administrator. Do not change the SMTP port unless you are certain of the correct setting.
8. When you are satisfied with the information on this page, click **Next**.
The Receive page will open.
9. In the **POP3 Server** field, enter the name of your POP3 server. This information will be available from your network administrator or ISP.
10. Enter your user name in the **User Name:** field.

Note: The user name entered here will either be the user name assigned by your ISP, or the user name assigned by your network administrator if you are using a proxy server.

11. Enter the password for your e-mail account in the **Password:** field. If you do not enter a password here, you will be prompted for one each time you attempt to receive mail.
12. Enter the POP3 port in the POP3 Port: field, if different from 110.

Warning! Only the network administrator should ever change this setting. Do not change the POP3 port unless you are certain of the correct setting.

13. Mark the **Always retrieve mail from this account** checkbox if you want to automatically check this account for new mail. Any account with this option selected will be checked for mail whenever **Receive** is selected from the **Tools** menu, and periodically if **Check for message every** is selected on the Delivery page of the Preferences dialog box. This option is not available for your default account because it is always used on this account.
14. Mark the **Delete messages from server** checkbox to if desired.

Note: If you mark this checkbox, any messages retrieved from the server by this user will not be available from other locations where you may also retrieve mail. If you do not mark this checkbox, and you permanently delete a message, the message will be retrieved again the next time you receive mail. This checkbox will normally be marked if this is the primary location from which you will access this account.

15. When satisfied with the information on this page, click **Next**.
The Connection page will open.
16. Select the radio button which describes the method you use to access this account, either Use Dial-up Networking/RAS or local area network. If you choose Dial-up Networking/RAS, you will be connecting directly to your ISP. If you select local area network, you will be using a proxy server.
17. If you selected Connect through my local area network, continue to step 20.
- or** If you selected Dial-up Networking/RAS, the drop-down list will become available. If you have more than one DUN mailbox established, select the desired mailbox from the list.
18. Enter the user name for your ISP account in the **User Name:** field.
19. Enter the password for your ISP account in the **Password:** field.
20. When all information is correct, click **Finish**.

The Internet Account Wizard will close. If this is your first logon with this mailbox, TeleMagic Internet Mail will open. If you are adding a new account to an existing mailbox, you will return to the Preferences dialog box.

Working with Existing E-mail Messages

All messages in TeleMagic Internet Mail will be located in one of six system folders, accessible from the main screen. Although the user can freely relocate messages within these folders, they will normally be assigned as follows:

Inbox – contains messages you have received

Outbox – contains completed messages you have written, but have not yet sent

Sent – contains copies of messages you have written and transmitted

Deleted items – a holding place for items before being permanently removed.

On Hold – contains messages that are not quite ready to send

Undeliverable – contains messages that could not be sent for any of several possible reasons.

You can also create your own mailboxes to serve your particular needs, such as all e-mail from an important client.

When you receive an e-mail message, and have read it, you can do any of several things with it, individually or in combination:








- ?? You can leave it for consideration later
- ?? You can reply to the sender
- ?? You can forward it to another person or a number of people, with or without an attachment
- ?? You can delete it
- ?? You can print it


Organizing messages


At the top of the upper section of the E-Mail screen are seven categories that will help you to organize your messages. Clicking on the category button will sort the messages below it numerically, chronologically, or alphabetically. For example, clicking on the **Date Received** button will sort all the messages in that column from newest to oldest. Clicking again will sort them from oldest to newest.


Note: Alphabetizing will be done according to the first letter in a text field, meaning that names will be sorted according to first names, not last.

The first column contains an icon for each message, indicating its status:

	Message has been opened		Message is pending
	Message has been replied to		Message is queued to the server
	New message (unopened)		Message is queued locally
	Message that has been sent		

When the second column contains the paper clip icon , the message has an attachment.

A check mark  in the third column indicates that the message is marked.

A chain icon  in the fourth column indicates that the message is linked.

From identifies the sender. This field changes to **To** in the Outbox and Sent Mail mailboxes.

Subject indicates how the sender has decided to identify the message. TeleMagic Internet Mail requires a subject to send a message. Messages can be received without a subject.

The last column depends on whether you are viewing the Inbox or another mailbox. In the Inbox, this field is a **Date Received** field. In all other mailboxes, this field will tell you when the message was **Last Modified**.


Note: The width of these columns is variable. To change the width, place your cursor on the line separating two of the buttons at the top of the columns. Click and drag to the desired width. If a column has been narrowed to zero width, it can be widened again by reversing the process.

Sending E-mail Messages

The TeleMagic e-mail system offers you considerable versatility when you write an e-mail message. You have the option of sending a message to TeleMagic users, TeleMagic contacts, addresses in your Internet address book, addresses in your MAPI address book, or you can manually enter addresses. You can send the message immediately, or keep it in your own mailbox to be sent later.

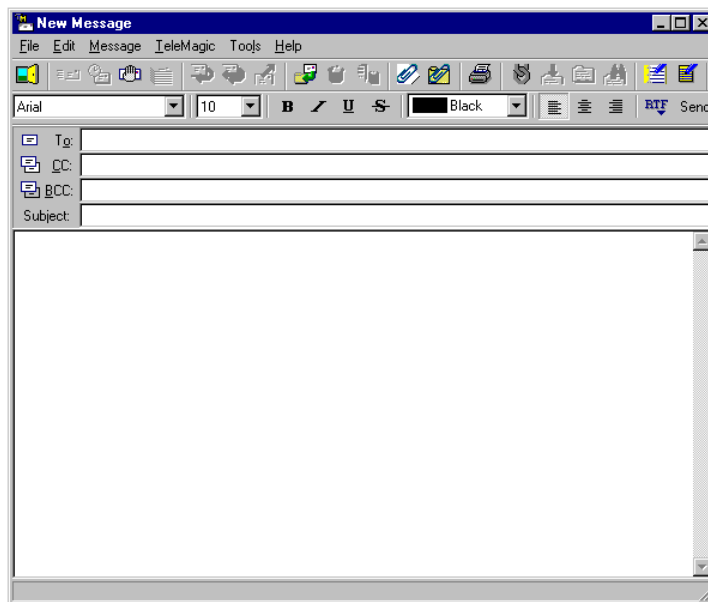
To compose an e-mail message in TeleMagic Internet Mail:

1. From the **Message** menu, select **New Message**.

or Click on the Compose a New Message icon: .

or Press CTRL+N


The New Message screen will open:




2. Type the e-mail address in the **To:** line.

or Click over the **To:**. The Select Recipients dialog box will open. Click on the tab corresponding to the address book you want to use and select the address from the available choices.





Note: If there is a pipe character “|” anywhere in the e-mail field, you will not be able to e-mail to this address. (Placing this character in a field allows you to maintain a record of the e-mail address, while preventing e-mails from being inadvertently sent to it. This is particularly useful if you have received a request from a contact that no e-mail be sent, especially if this request is for a limited duration, such as while the contact is on vacation.) If you are e-mailing to all contacts in a filter, any e-mail addresses containing a pipe character will be skipped.

3. Enter the name of other recipients to whom you want to send a copy in the **CC:** field, if any.
4. Enter the name of anyone whom you want to receive a blind copy in the **BCC:** field, if any. Recipients on this list will not be seen by other recipients, and will not receive responses from other recipients who use Reply to All  to answer this message.
5. Enter a subject for the message in the **Subject:** field.

Note: All messages must have a subject to be transmitted successfully. Messages to be stored in the **On Hold** mailbox do not require a subject and will be assigned a status of “pending”. These messages will not be transmitted immediately. These messages must be given subjects before they can be sent.

6. Compose your message in the space provided.
7. Click on the **Spell Check** button  if you want to spell-check the message.

When you are satisfied with your message, you have several options:

- ?? You can send the message. (Click **Send** .)
- ?? You can place the message in the **Outbox** to be sent later. (Click **Send Later** .)
- ?? You can place the message **On Hold**. (Click **On Hold** .)
- ?? You can queue the message. (Click **Queue** .)
- ?? You can save the message to one of your other Mail Boxes. (Click **Save to Folder**  and choose a folder from the Save to Folder dialog box.)

Addressing Messages

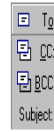
Rather than writing in a name of a recipient in the **To:** or **CC:** or **BCC:** you can choose a recipient from an address book. There are four address books available:

- ?? The TeleMagic address book consists of TeleMagic users. This includes users at sites under synchronization.
- ?? The Internet address book consists of entries made by you and can include any valid Internet e-mail addressees.
- ?? The MAPI address book is available if you are using a MAPI application. MAPI applications are messaging programs which uses a certain set of protocols to provide communications services. It will consist of addressees set up in your other mail application.
- ?? The Contact address book that allows you to access your TeleMagic databases for e-mail address information.

To address a message using an address book in TeleMagic Internet Mail:

1. Move your cursor over the label of the line you want to address.

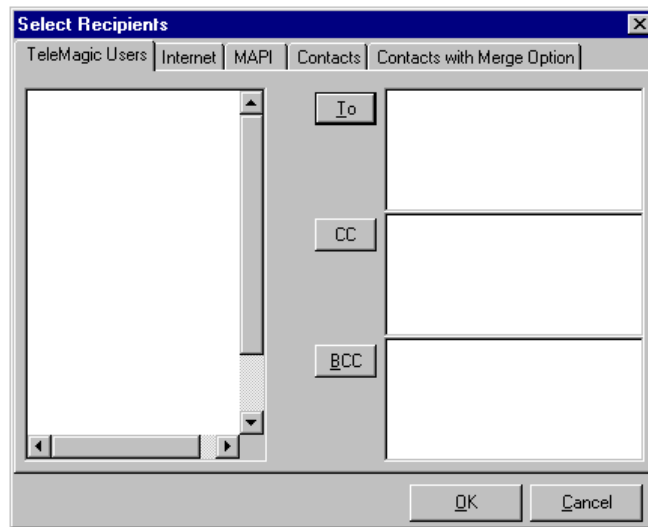
The label will become outlined:



Address Line Labels with **To:** Selected

2. With the desired address line label still highlighted, click the mouse.

The Select Recipients dialog box will open:



Sample Select Recipients Dialog Box

3. Click on the tab corresponding to the address book containing the recipient(s) of the message:

TeleMagic

TeleMagic users who have e-mail information in Preferences. (Only available if you are logged on to TeleMagic.)

Internet

Addresses that you have added to this address book.

MAPI

Addresses available from your MAPI application. (Only available if you are logged on to MAPI.)

Contacts

Use this page to address e-mail to contacts in your database. Messages addressed using this page will not be linked to the contact. Multiple addressees are supported when using this page.

Contacts with Merge Option

Contacts in your TeleMagic databases. This page provides several means with which to search through your databases. Messages addressed using this page can be sent to filters and can have merge documents attached.



4. From the list of potential recipients in the box on the left, highlight the names of those to whom you want to send mail.
- or** If you are using the Contacts page, click on the button corresponding to the address field you want to fill in. The Advanced Search dialog box will open. Select the database, filter, and index to search for the addressee. You cannot attach merge documents to messages addressed using this option. Proceed to step 6.
- or** If you are using the Contacts with Merge Option page, select the radio button corresponding to the addressing option you will be using (current contact, other contact, or filter). You will be able to search or browse for the addressee, if not the current contact. If you choose Filter, you will be able to select from the available filters for the current database and the level to use for merging. You are limited to one entry per address field when using this option, but that entry can be a filter. Using a filter will result in messages for all contacts in the filter. You must use the Automation Server to send messages addressed using this option. Proceed to step 6.
5. Click on the **To:** button to add the recipient(s) to the **To:** address line.
- or** Click on the **CC:** button to add the recipient(s) to the **CC:** address line.
- or** Click on the **BCC:** button to add the recipient(s) to the **BCC:** address line.
6. Click **OK**.

The Select Recipients dialog box will close. The recipients will appear in the address lines as designated.

Receiving E-Mail Messages

TeleMagic Internet Mail will periodically check for new messages automatically, or you can check manually. The automatic feature is part of installation and is covered in the *System Administrator Guide*. Even if you have set TeleMagic Internet Mail to automatically check for mail, you can still check manually.

To check for new e-mail messages:

1. Click on the **Receive Messages**  or **Send and Receive**  button.
or From the **Tools** menu, select one of the following:
 - Receive** to check your default server and any servers that have been set up to Always Receive.
 - Receive From** and select the desired server to check.
 - Send and Receive** to send any messages in the Outbox and check the default server.A status screen will appear.
2. Close the status screen, if you have not set the screen to close automatically.
Any new messages will appear in your Inbox.

To read (open) an e-mail message:



1. In the “Mailboxes” section of the TeleMagic Internet Mail screen, click on Inbox.
A list of messages and their attributes will appear in the top section of the screen.
 2. Single-click on the message you want to open.
If you have configured your view to Show Message Body, the message will appear in the lower section of the screen.
- or** Double-click on the message to view it in a separate window.

Note: The same procedure can be used for messages in all mailboxes.

TeleMagic Internet Mail will attempt to use the address that the message was sent to as the From: address in the reply. You must have a server set up with the address for Internet Mail to be able to use it. Otherwise, your default address will be used. For example, Terry Thompson receives mail via 2 addresses: tthompson@abc.com and hr@abc.com. The mail server is set up to deliver messages addressed to hr@abc.com to the tthompson@abc.com address. If Terry has only created one Internet Mail server, tthompson@abc.com, then that is the address that will appear on any reply messages regardless of how they were

addressed. However, if Terry has created two Internet Mail servers, the default tthompson@abc.com server and an hr@abc.com server, Internet Mail will use hr@abc.com as the **From:** address for any replies to messages sent to hr@abc.com.

To reply to a message:

1. Select the Mail Box containing the message you want to answer.
The contents of the Mail Box will be displayed.
2. Select the message you want to reply to by single-clicking.
or Double-click the message to open it to a full screen view.
3. Click on the **Reply to Sender** button . This will reply to the originator of the message.
- or** Click on the **Reply to All** button . This will reply to the originator and all recipients except BCC recipients.


Note: You can enter additional recipients in the To:, CC:, and BCC: lines.

A New Message screen will open addressed to the appropriate recipient(s). The subject of the message will appear in the screen's title bar and Subject: field. The subject will be "Re:[original message subject]" by default. This can be edited, if desired.

4. Compose the reply to the message.
5. Send the message as you would an original message. If the original message was linked, the copy of the message in the Sent folder will also be linked.

Note: If you reply to a message that is linked to a contact, the copy of the reply that is located in your Sent folder will be linked to that contact as well, and the e-mail will be shown in the e-mail rollup for that contact.

To forward a message:

1. Select the Mail Box containing the message you want to forward.
The contents of the Mail Box will be displayed.
2. Select the message you want to reply to by single-clicking.
or Double-click the message to open it to a full screen view.
3. Click on the **Forward Message** button .

The message will appear in a New Message screen. The subject will appear in the screen's title bar and subject field. The default subject will be "FW:[original message subject]".

4. Enter the address of the recipient(s) in the To: line. The address can be entered directly or from one of your address books.

Note: You must enter at least one recipient in the To: field. You can also enter recipients in the CC: and BCC: field.

5. Edit the message as required.
6. Send the message as you would a new message

Other E-Mail Features

There is much more to email than simply sending and receiving messages. With TeleMagic e-mail, you can use a variety of options to take full advantage of electronic communication. Along with a written communication to your recipient, you can also send different kinds of files attached to the message. This gives you additional flexibility, since you can use this function to attach such things as written documents that you and the recipient are working on jointly, or a graphics file, or even a software program.

There are two broad categories of attachments to your messages: Files and Merge Documents. File attachments differ from Merge Document attachments in that a File attachment will not be modified for each recipient. A Merge Document will have all of the merge fields filled with the appropriate information for each recipient before being sent. There is no specified limit to how many attachments you can add to a document. You can add documents in any order and combination that you like.

Note: The Custom Merge Field feature is not available for use with merge documents sent as e-mail attachments. If you attach a document containing custom merge fields to an e-mail message, those fields will be ignored.

To attach a file:

1. From the New Message dialog box, click on the Add a File Attachment button .

or From the **Message** menu, select **Add Attachment**.


The Open dialog box will appear.

2. Select the file you want to attach.
3. Click on **Open**.

The dialog box will close and an icon and the filename of your attachment(s) will be listed at the bottom of the New Message box..

To attach a merge document:

Note: To attach a merge document to a message, you must either link the message to a contact, or send the message to a contact or filter.

1. From the New Message dialog box, click on the Add a Merge Document as an Attachment button .

or From the **Message** menu, select **Add Merge Document**

The Select Document dialog box will appear.

2. Select either the **Contact Recipient(s)** or **Linked Contact** radio button from the Merge all attached documents for section. (The **Linked Contact** option is available only if the message is linked.) If you choose **Contact Recipient(s)**, the merge document will contain information drawn from the recipients record (each recipient will receive a unique document). If you choose **Linked Contact**, the merged document will contain information drawn from the linked contact's record (all recipients will receive the same message).
3. Browse for the merge document you want to attach from the tree view.

Note: Click on the folders to open them.

4. Highlight the desired file and click **OK**.

or Double-click on the file.


The dialog box will close and an icon and the filename of your attachment(s) will be listed at the bottom of the New Message box.

Linking to Contacts in TeleMagic

By linking an e-mail message to a contact, you will be able to quickly retrieve contact information and go directly to the contact from TeleMagic Internet Mail, paste contact information into the message, and attach merge documents to the message. You must be logged into TeleMagic Enterprise to use this feature.

To link an e-mail message to the current contact:


Note: TeleMagic must be open to use this feature.

1. Open the message for editing, or create a new message.
2. Click on the **Link Message to Contact** button .


The Link Contact dialog box will open.

3. Mark the **Current Contact** radio button to link the message to the current contact.
The message will be linked to the selected contact.


To link an e-mail message to a contact in the current database, other than the current contact:

1. Open the message for editing, or create a new message.
 2. Click on the **Link Message to Contact** button .
The Link Contact dialog box will open.
 3. Mark the Other Contact radio button.
The Search and Browse options will become available.
 4. Enter the information to be searched for in the **Search my contacts for:** field and click **Search**.
The message will be linked to the first contact matching the search criterion.
- or** Click **Browse** to search for the contact using a Browse screen. Click on the desired record to link the message.

To link an e-mail message to a contact in another database, or when TeleMagic is closed, using Search:

1. Open the message for editing, or create a new message.
2. Click on the **Link Message to Contact** button .
The Link Contact dialog box will open.
3. Mark the Other Contact radio button.
The Search and Browse options will become available.
4. Click **Advanced Search**.
The Advanced Search dialog box will open.
5. Select the database containing the record from the **Database** drop-down list.
6. Select the level of the database containing the record from the **Level** drop-down list.
7. Select the index to be used for the search from the **Index** drop-down list.
8. Enter the information to be searched for in the **Search for:** field.
9. Click **Search**.
The message will be linked to the first record in the specified database and level which meets the search criterion. If no matching record is found, you will be given the opportunity to browse for the record.

To link an e-mail message to a contact in another database using Browse:

1. Open the message for editing, or create a new message.
2. Click on the **Link Message to Contact** button .
The Link Contact dialog box will open.
3. Mark the Other Contact radio button.
The Search and Browse options will become available.
4. Click **Advanced Search**.
The Advanced Search dialog box will open.
5. Click **Browse**.
A browse screen will open. Click on the record to which you want to link the message. The message will be linked to the selected record.

To link messages automatically:

TeleMagic Internet Mail can search your databases for contacts with e-mail addresses that match the From addresses on your incoming messages. To use this feature, you must have an E-mail key field established.

1. From the **Tools** menu, select **Options**.
The Preferences dialog box will open.
2. Click the **TeleMagic** tab.
The TeleMagic page will open.
3. Mark the Automatically link incoming mail checkbox.
4. Click **OK**.
The Preferences dialog box will close. Incoming messages will be linked to the first record that has a matching e-mail address. Databases will be searched for matches according to your selection on the TeleMagic page of Preferences.

To link sent messages to contacts automatically:

TeleMagic Internet Mail can also link sent messages to contacts. When post processing is done on mail sent to a contact, this option will allow the mail to be linked to the contact record.

1. From the **Tools** menu, select **Options**.
The Preferences dialog box will open.

2. Click the **TeleMagic** tab.

The TeleMagic page will open.

3. Mark the Link Mail in Sent Folder checkbox.
4. Click **OK**.

The Preferences dialog box will close. Sent messages will be linked to the first record that has a matching e-mail address. Databases will be searched for matches according to your selection on the TeleMagic page of Preferences.

To attach a copy of a message to contact's rollup while linking:

Marking this checkbox will create a rollup entry in TeleMagic when linking an existing message to a contact.

1. From the **Tools** menu, select **Options**.

The Preferences dialog box will open.

2. Click the **TeleMagic** tab.

The TeleMagic page will open.

3. Mark the Attach a Copy of message to Contact's rollup when linking checkbox.
4. Click **OK**.

To attach a copy of message to contact's rollup:

The "Attach a Copy of message to Contact's rollup" check box, if checked, will create a rollup entry in TM, if the sent message is linked.

1. From the **Tools** menu, select **Options**.

The Preferences dialog box will open.

2. Click the **TeleMagic** tab.

The TeleMagic page will open.

3. Mark the Attach a Copy of message to Contact's rollup when checkbox.
4. Click **OK**.

To open a linked record:

Note: TeleMagic must be open to use this feature.

-  Click on the **Go To Linked Contact** button .

The Contact Manager will open with the linked contact displayed.

To view the linked contact's information without opening the Contact Manager:

☞ Click on the **View Contact Info** button .

The Contact Info dialog box will open.

Marking and Unmarking Messages

Sometimes you may want to take special note of some messages so that you can identify them more easily later on – messages all on the same subject, or all from one recipient, for example.

To Mark or unmark a Message:

1. Click on the message in the main TeleMagic Mail screen to highlight it.
 2. Select **Message, Mark**.
- or** Select **Message, Unmark** to unmark the message.

A check mark will appear on the line with the message.

Taglines

Taglines are a way to personalize your messages. You can write and format a short message, known as a tagline, and place it into any message, usually at the end. You can have a tagline inserted in all your documents, or just in one. Taglines can be anything you want them to be—a zany *bon mot*, a quote from someone you admire and whose wisdom you wish to share with others, or even a haiku.

To Create a Tagline:

1. From the **T**ools menu, select **Tagline**.
The Edit Your Tagline dialog box will open.
2. Enter your tagline in the space indicated.
3. To automatically insert your tagline in all of your messages, mark the Automatically insert Tagline into new messages checkbox.
4. Click **OK**.

The Edit Your Tagline dialog box will close.

To Insert Your Tagline Manually:

1. Open a message for editing.

2. Place the insertion cursor where you want the Tagline to appear.
 3. From the **Tools** menu, select **Insert Tagline**.
- or** Press CTRL+T.

The tagline will appear in the selected location.

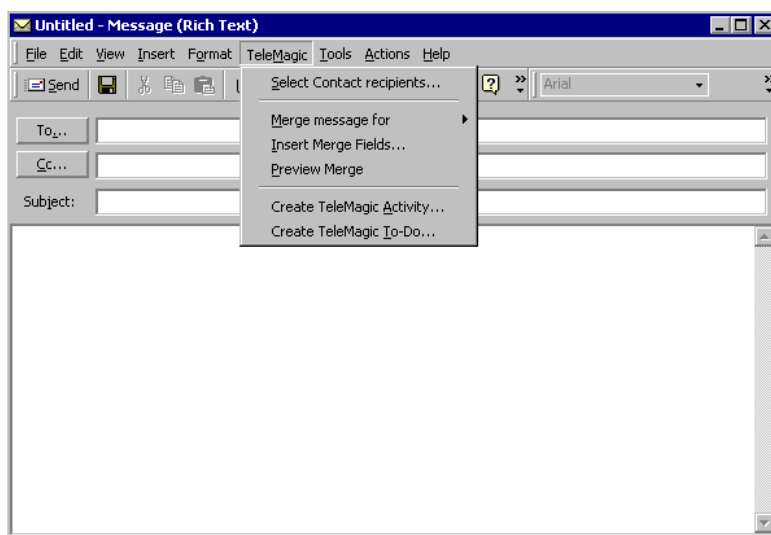
Using TeleMagic with Microsoft Outlook

The two great advantages to using TeleMagic features in Microsoft Outlook are familiarity and power. TeleMagic's integration with Microsoft Outlook does not affect the familiarity of Outlook in any way. You will still create and send messages in the same way you did before the integration. However, TeleMagic's features in Microsoft Outlook allow you the power of being able to select e-mail addresses from your TeleMagic database contact records, use TeleMagic merge fields in your e-mail to create targeted mass-emails, and keep track of your Outlook e-mail by creating Activities or To-Dos based on the e-mail. These features may all be found in the **TeleMagic** menu in the Message screen in Outlook.

TeleMagic Menu in Microsoft Outlook Messages

Note: There is no TeleMagic Menu on the main menu bar.

All of the integrated TeleMagic features in Microsoft Outlook will be contained in the **TeleMagic** menu on the Message screen:



TeleMagic Menu in a Microsoft Outlook Message

As you can see, there are six main options on the menu. Their functions will be covered below.

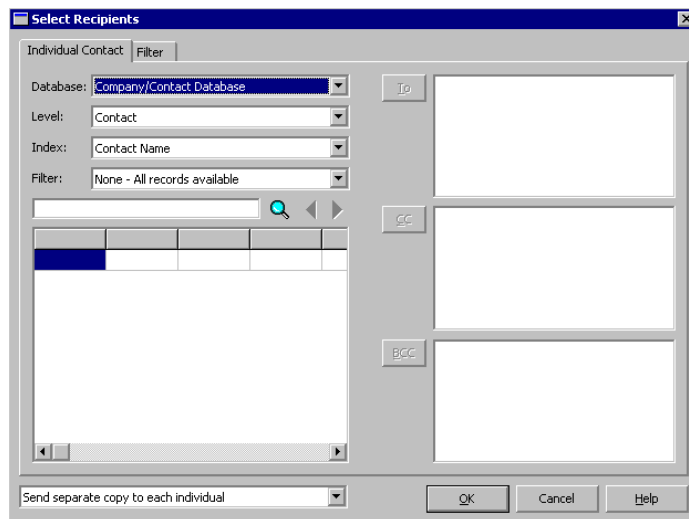
Select Contact recipients

Selecting Contact recipients allows you to find recipients for your message through TeleMagic databases, rather than adding each contact's e-mail address to an address book. This facilitates adding recipients to a message. You can also add contact e-mail addresses from TeleMagic filters, thus making a mass mailing quick and precise.

To Add an Individual Contact as a Recipient:

1. Choose **Select Contact recipients...** from the **TeleMagic** menu.

The **Select Recipients** dialog box will open:




The Select Recipients Dialog Box

2. Select the proper database and level from the drop-down lists.

WARNING! If the level you choose does not have an e-mail key field, you will receive an error message and be unable to select recipients.

3. Choose an index from **Index:** drop-down list the to create a search order for e-mail addresses. If desired, you may further restrict the possible search records by defining them in a filter from the **Filter:** drop-down list.

Note: This is different from the **Filter** tab. This merely restricts the number of search records, but does not select all of the filtered records to become recipients, as it does on the Filter screen.

4. Once you have set your search parameters, click the search icon . No records will be returned until this happens.

The results will be returned, at least ten at a time (according to your preferences) in the list below.

- or** Enter search text in the field to the left of the search icon and then click the icon.
5. Make a selection from the list returned by searching. Once the contact is highlighted, the three buttons on the right side of the screen will become active.
 6. Select a delivery option from the drop-down list below the list.

WARNING! If you are sending a broadcast message (the option **Send separate copy to each individual** from the drop-down list), and you have recipients in the **CC:** or **BCC:** fields, each of these recipients will receive a copy of the message for each recipient in the **To:** field.

7. Click one of the address fields: **To:**, **CC:**, or **BCC:**, to add a contact to the message recipient list.

Repeat steps 2 through 7 until you have finished selecting individual contacts to receive the message.

Click **OK** to exit, or click the **Filter** tab to continue adding recipients.

To Add Contacts in a Filter as Recipients:

Note: If you are adding both Individual Contacts and Filter contacts as recipients, note that when you click on the other tab in the screen, those recipients listed on the other screen will not be listed. For example, Filter contacts will not be listed on the Individual Contacts page. However, all contacts will be added as recipients.

1. In the Select Recipients dialog box, click the **Filter** tab.
2. Select **Database:** and **Level:** from their respective drop-down lists.

A list of available filters will appear.

3. Highlight the desired filter.
4. Select a delivery option from the drop-down list.

WARNING! If you are sending a broadcast message (the option **Send separate copy to each individual** from the drop-down list), and you have recipients in the **CC:** or **BCC:** fields, each of these recipients will receive a copy of the message for each recipient in the **To:** field.

5. Click one of the address fields to add the contacts in the filter as recipients.

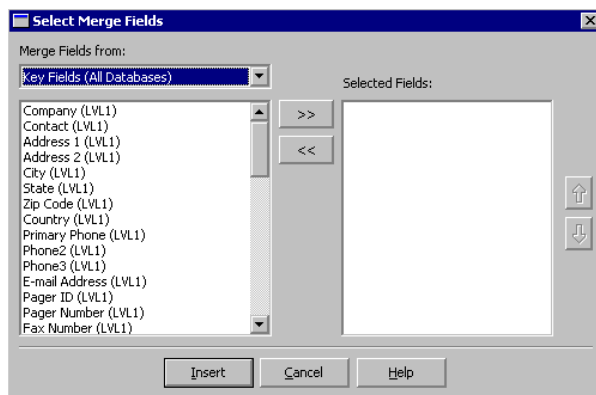
Click **OK**.

Merging E-Mail in Microsoft Outlook

Just as in TeleMagic Internet Mail, you can produce targeted mass mailings with the TeleMagic features in Microsoft Outlook. There are three options in the **TeleMagic** menu involving merges: **Merge Message For...**, **Insert Merge Fields...**, and **Preview Merge**.

To Create an E-Mail with Merge Fields:

1. Create a new message in Microsoft Outlook.
2. If desired, select Contact Recipients as discussed earlier in the chapter.
3. Click in the body of the message and compose the message up to the point where you want to insert a merge field.
4. Select **Insert Merge Fields...** from the **TeleMagic** menu. The **Select Merge Fields** selection box will open (by default, it will open to Key Fields):



Select Merge Fields Selection Box

5. Make a selection from the Merge Fields from: drop-down list. The choices from the merge will appear in the box below.
6. Choose a merge field and double-click it.
or Select a merge field and click the > > button.
7. Repeat step 6 until all desired merge fields are selected.
8. Set the insertion order using the up and down arrow buttons on the right of the Selected Fields: list.
9. Click **Insert**.

Note: When selected at the same time, clicking **Insert** will cause the selected fields to insert at the selection point, with each field separated by a hard return.

10. Repeat steps 4 through 9 at each place in the e-mail where you want to insert merge fields.

To Choose Which Records to Merge:

Note: The options in **Merge Message For...** determine which records will be included in the merge, *not* who will receive the message. The recipients are determined in the **Select Contact Recipients** dialog box.

1. Select the **Merge Message For...** option from the **TeleMagic** menu. A sub-menu will open with two options: **Contact Recipients** (the default), and **Select Contact...**
2. Select **Contact Recipients** if you wish the records of the message recipients to be used in the merge. This means that each recipient will see his personal contact information in the e-mail. Continue composing your e-mail.

Note: The option to merge for the Contact Recipient is only available if each recipient is receiving a private copy of the mail (the **To:** field).

3. In some cases, you may want to merge information from a contact record that is not receiving a copy of the mail. For instance, you may select to e-mail address information to a salesperson for his next appointment. To do this, select **Select Contact...** from the **Merge Message For...** sub-menu. A **Select Contact** dialog box will open.

Note: You do not have to be sending mail to a TeleMagic contact to use this option.

4. In the **Select Contact** dialog box, choose **Database**, **Level**, **Index**, and **Filter** from the drop-down lists.
5. Select one of the three radio buttons: **None**, **Current Contact**, or **Find**. Select **None** if you do not want any contact information merged. Skip to Step 9.
- or** Select **Current Contact** if you want the current contact's (in TeleMagic) information merged. Skip to Step 9.
- or** Select **Find** if you want to find the contact by entering other information about the contact and opening a list of records.
6. In the search field next to the **Find** radio button, enter your search text.
7. Click **Find** to begin the search.

A list of possible contacts will appear in the box.

8. Select the contact from the list whose information you want included in the merge.

Click **Select**. The contact's information will now be merged into the e-mail.

To Preview Merge:

1. Select **P**review Merge from the TeleMagic menu.
2. The message will be previewed one of two ways: if you chose **S**elect Contact..., the message will be shown with the selected contact's merge information. If you have chosen **C**ontact Recipients, the message will be shown with the information of the first contact in the **To:** field of your recipient list.
3. To stop the preview, re-select **P**review Merge from the **T**ele**M**agic menu.

Using Microsoft Outlook E-Mail with Activity Manager

Keeping track of your e-mails is important for many reasons. The last two options in the **T**ele**M**agic menu in Microsoft Outlook allow you to keep accurate records of the e-mails you send by listing them either as completed Activities or as completed To-Dos. Please see the *Personal Calendar* section of this manual for more information about entering Activities and To-Dos.

To List an E-Mail as a Completed Activity:

1. Choose **C**reate **A**ctivity... from the **T**ele**M**agic menu.
2. The Activity dialog box will open. Add the activity in the way described in the *Personal Calendar* chapter.
3. When you have finished adding the Activity, click **OK**.

The Activity will now be listed in your Activity Manager (unless you have hidden it).

To List an E-Mail as a Completed To-Do:

1. Choose **C**reate **T**o-Do... from the **T**ele**M**agic menu in the Outlook message.
2. The To-Do dialog box will open. Add the To-Do as described in the *Personal Calendar* chapter.
3. When you have finished adding the To-Do, click **OK**.

The To-Do will now be listed in Activity Manager.

DIALER

Phone Calls

The TeleMagic Dialer is designed for anyone who uses the telephone to communicate with contacts and clients regularly. The Dialer helps you integrate your contact records with your phone—dialing from TeleMagic, keeping notes on your conversations in the contact records, and creating completed activities based on phone activity.


While in the Dialer, you are free to move around within TeleMagic to view contacts, activities, sales forecasts, or other information you may need to look at while you are talking to a contact.

When you finish a call, TeleMagic will automatically update your Activity Manager and any related on-screen notepad or contact history.



You can still use the Dialer to keep track of phone calls and phone-related activity even if you are not using an automatic dialing device to physically dial the calls.

To Make an Outgoing Call:

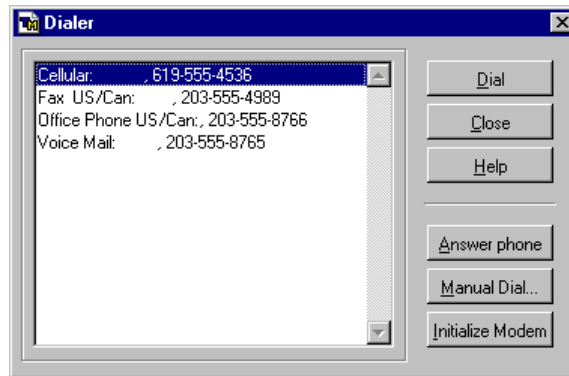
Note: You must set up your dialer in Preferences before you can use this procedure.

1. From the Contact Manager, go to the record for the contact you want to call. (If you do not have a contact record for the person you want to call, create one.)
or From the Activity Manager, select an activity which is linked with the contact you want to call.
2. From the TeleMagic toolbar, click the Dial button , or press ALT+D.

Note: You may need to configure your toolbar for this control to be present.

 **Hint:** In the Contact Manger, you can click the phone icon  beside the number you want to dial and skip to step 4.

The Dialer selection box will open. It will display all phone numbers for the contact you have displayed (or to whom your activity is linked):



Sample Dialer Selection Box

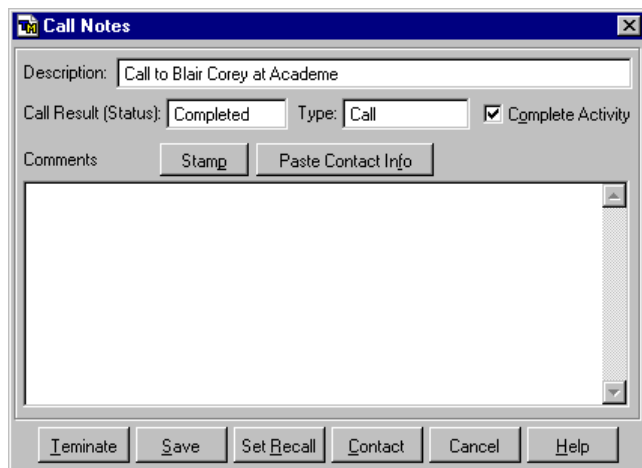
Note: TeleMagic will display all phone numbers listed on any page of the *current level*. For example, in the Documentation database, if you display Blair Corey's contact record, TeleMagic lists any phone number on the Contact Data, Contact History, or Contact Profile pages. Phone numbers on pages of the Level 1 (Company Data) screen are not listed.

3. Highlight the phone number you want to call, and choose **Dial**.

If you do not have a modem selected in the Dialer Preferences **Dial Using:** drop-down list, the Call Notes dialog box will open when you choose **Dial**. (If you have no modem selected, you must dial the phone manually.)

- or** If you have set TeleMagic up to dial the phone for you, there will be a brief pause as TeleMagic dials the phone.
4. Pick up the phone when indicated.

The Call Notes dialog box will open:




The image shows a 'Call Notes' dialog box with a blue title bar. It contains a 'Description' text field with the text 'Call to Blair Corey at Academe'. Below this are two dropdown menus: 'Call Result (Status):' set to 'Completed' and 'Type:' set to 'Call'. To the right of these is a checked checkbox labeled 'Complete Activity'. Below the dropdowns are two buttons: 'Stamp' and 'Paste Contact Info'. A large text area for 'Comments' is below these buttons. At the bottom of the dialog are six buttons: 'Terminate', 'Save', 'Set Recall', 'Contact', 'Cancel', and 'Help'.

Call Notes Dialog Box

Note: If the Call Notes dialog box does not appear, your dialer setup is not configured to record call notes. If you want to have your call notes recorded in TeleMagic, you must have either Inset Notes into Notepad or Create Activity selected in Dialer preferences.

The **Description** will be filled in as **Call to** and the contact's name. The **Call Result (Status)** will default to **Completed** and the **Complete Activity?** checkbox will default to marked. The **Type** will default to **Call**. Your cursor will appear in the **Comments** field. As the call progresses, the call duration will appear at the bottom left-hand corner of the TeleMagic status bar:


Call in progress - duration: 0:02:07

 **Hint:** You can change the status of the call from **Completed** either by typing a new status in the **Call Result (Status)** field, or by placing your cursor in the field and right-clicking the mouse and selecting another status from the list box. You can also set the default **Call Result** in Dialer Preferences.


5. If necessary, place your cursor in the **Description** field and enter a new description. (The description will appear in your Activity Manager, the notepad stamp, and any related activity rollups.)

The **Call Result (Status)**, **Type**, and **Complete Activity?** fields will be used if you are creating an activity based on the call (i.e., if you have **Auto Track Phone Calls** selected in Dialer preferences.)

6. If necessary, edit the information in the **Call Result (Status):** field or press F2 to access the list box that is used in the **Call Result (Status):** field in the Activity Manager.

 **Hint:** You can change the default value of the Call Result field in Dialer Preferences.

7. If necessary, edit the Activity **Type** or press F2 to access the list box used in the **Type** field in the Activity Manager.
8. If you do not complete the call, unmark the **Complete Activity?** checkbox.

 **Hint:** There is a setting in Dialer Preferences that will remove the **Complete Activity?** checkbox. When this option is selected, call tracking activities will always be completed.


Note: If you have not edited the **Call Result (Status):** field, it will change from **Completed** to **Pending** when the **Complete Activity?** checkbox is unmarked.

9. Keep notes of your conversation for future reference in the **Comments** field. These will be recorded in the **Comments** box of the scheduled activity in the Activity Manager and in the contact's notepad in the Contact Manager (based on your preference settings).

Note: If you have accessed the Call Notes dialog box from a Call type activity, any comments associated with the activity will be pasted in the **Comments** field of the Call Notes dialog box by default. Any changes you make to the comments here will also be reflected in the related activity.

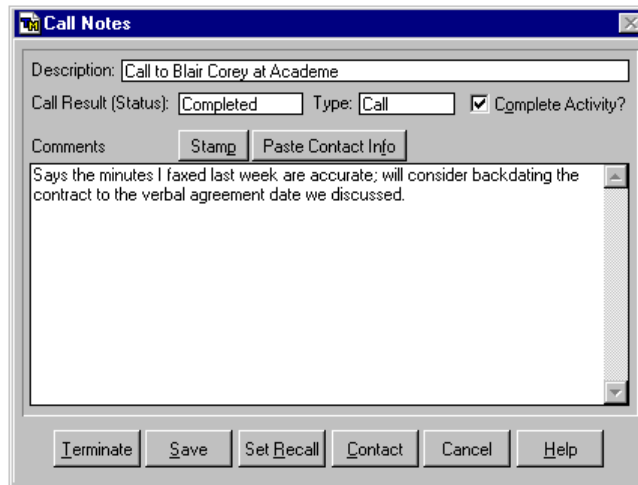
10. To access the Contact Manager, click **Contact**.

The Call Notes dialog box will be placed in the background. The Contact Manager will open to the contact with which the call is associated. If you have moved to a different contact, you will be returned to the associated contact record. You will be able to move through the Contact and/or Activity Manager in the usual fashion.

11. When you want to return to the Call Notes dialog box, click the Dial button  on the toolbar, or select **Dial Notes** from the **Office** menu, and the Call Notes dialog box will reopen.

If you are using the **Create Activity** feature to create an activity based on your call, the call status will appear in the **Call Result (Status)** field in the new activity.

The completed dialog box will look similar to this:



Sample Completed Call Notes Dialog Box

12. You have three options when completing the call:

Terminate will stop the call duration timer. A duration field will appear above the comments on the right displaying the length of the call. You will remain at the Call Notes dialog box where you can make any additional notes. (When you are ready to exit, click **Save** or **Set Recall**. Alternatively, you can click **Cancel** to exit without saving the call.)

Save will stop the call duration timer, save the call, and exit the Call Notes dialog box.

Set Recall will terminate and save the call and open a Set Recall dialog box.

Note: When you save the call, if you are no longer at the same record in the Contact Manager that was open when you accessed the Dialer feature, you will be asked whether you want to return to that contact's record. If you choose **Yes**, the call will be associated with the contact record that was open when you first accessed the Dialer feature. If you choose **No**, the call will be associated with the currently open contact record.

Note: When you save call notes, you may see a prompt similar to this: "Add call information to the call you had scheduled at 9:00 a.m. today?" This appears only if you have scheduled a call or recall for this contact sometime today and have placed a call without using that scheduled call or recall. If you have placed the call from the activity, you will be asked if you want to complete the activity or add a new activity.

If you have a Last Call field, TeleMagic will update it with the call date, time, user ID, and a plus (+) or minus (-) sign. A plus sign indicates an incoming call, a minus sign indicates an outgoing call..

If you have the notepad field defined in Key Fields and have **Insert Notes into Notepad** selected in Dialer preferences, TeleMagic will update the designated field with the date and time of the call, your User ID, whether the call was incoming or outgoing, the duration of the call, the call status, call description, and your call notes. The completed notepad entry will look similar to this:

Contact - Blair Corey at Academe

Contact Name: Blair Corey
 Title: Chief, Purchasing
 Dear: Blair
 Alternate Contact: Peter Wiley (Secretary)

Notes:
 08/20/2099 4:42p - JRC - Out. 6.43.
 Status: Completed - Call to Verify our July Meeting Notes
 Says the minutes I Faxed last week were accurate; will consider backdating the contract to the verbal commitment date we discussed.

Phone Numbers:
 Office: 203-555-8766
 VMail: 203-555-8765
 cellular: 619-555-4536
 Fax: 203-555-4989
 Home:


Record History:
 Start: 06/18/96 10:35:09 TST
 Last Revision: -06/18/1996 11:00:55 TST

company: Academe
dept: Purchasing
custid: DEM9606180072

1st Contact: Not found
lastcall: Call not found
Next Call: Call not found

Account:
 Rep: KMK
 Status: Customer


Documentation Database Screen, Showing Updated On-Screen Notepad and Last Call Activity Field on Level 2, Page 1

If you dialed from the Contact Manager and if you have **Create Activity** selected in Dialer preferences, TeleMagic will also add a scheduled activity to your calendar. The activity will include the call date, time, description, duration, and status entered into the appropriate fields, and call notes entered into the Comments box. In addition, the Activity List (available from the **View activities linked to this record** button  on the control bar) and any Activity rollups you have added to the contact's record TeleMagic will update to show the call.

Answering the Phone

You can record call notes and update Activity Manager entries when answering the phone just as you do when dialing out.

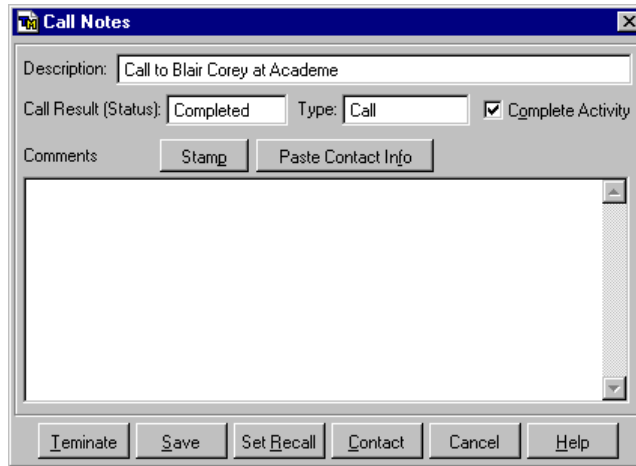
To Answer the Phone and Record Call Notes:

1. Go to the record of the contact who is calling and click the Answer the Phone & Start a Call button 

or From the **Office** menu, select **Dial**. From the Dialer selection box, click **Answer Phone**.

The Dialer selection box will open, the **Dial** item on the **Office** menu will change to **Call Notes**. If you are not tracking calls, this menu item will change to **Terminate**.

2. The call duration timer will start and the Call Notes dialog box will open:




Call Notes Dialog Box

Note: If you do not see a Call Notes dialog box you do not have any preference settings selected which will save your call notes. If you want to have your call notes recorded in TeleMagic, select **Create Activity** and/or **Insert Notes into Notepad** in Dialer preferences.


As the call progresses, the call duration will appear at the left-hand corner of the TeleMagic status bar. The **Call Result (Status)** will default to **Completed** and the **Complete Activity?** checkbox will default to marked. The **Type** will default to **Call**. TeleMagic will fill in the **Description** as **Call from** and the current contact's name. The contact's name will be highlighted.

3. Type in the name of the person calling if it is not the current contact, or enter a different call description.

 **Hint:** Just the contact name will be highlighted in the **Description** field. If you want to leave the description as **Call from** and only change the contact name, simply start typing. If you want to change the entire field, use your mouse to highlight the whole entry.

4. If you were not at the correct contact record when you accessed the Dialer feature, click **C**ontact to access the Contact Manager.

The Call Notes dialog box will be placed in the background. Use the Contact Manager navigation tools to locate the required record. To return to the Call Notes dialog box, click

on the Dial button , or select **D**ial Notes from the **O**ffice menu. If you Choose **S**et **R**ecall, after changing records in the Contact Manager, you will be given the opportunity to return to the record where the call was originated. If you choose **Y**es, the activity will be linked to the record where you started the call. Otherwise, it will be linked to the current record.

BRANCH SCRIPTING

What are Scripts?

A script is a pre-written set of statements, answers, questions, or prompts that can be used by anyone who works with customers over the telephone. Scripts can be simple— a one-line greeting given by a receptionist, for instance; or complex — the multi-layered conversation that would be required for the customer information service of a national bank. They can be designed for incoming calls as well as outgoing calls.

In addition, scripts can be used for purposes other than making phone calls. For example, they could be a storehouse for specific instructions and information on how your company uses a TeleMagic database.

Think of a script as a tree with a trunk and many branches, any branch can bring you to more branches; choosing one of these can lead you to yet more branches, and so on. There is no specific limit to how many branches you can have.

Using Scripts

When you speak with a customer or prospect, questions that are asked and statements that are made will lead you down a particular path. A TeleMagic script helps you control that path, provides you with the information you need every step of the way, allows you to quickly back up if the conversation suddenly changes direction, and creates an automatic recording of the branches followed for later reference.

TeleMagic comes with a number of sample scripts; one in particular, “New Subscriptions,” is short and simple. It scripts a specific promotion for an imaginary newspaper’s New Subscriptions department. It offers a prospective subscriber three weeks’ worth of free newspapers. The prospect may be:

- ?? Interested, in which case they hear more details about the offer while their database record is checked for accuracy, or if necessary, amended.
- ?? Not interested, in which case they will hear reasons to change their mind. (If they change their mind, they will be treated like the interested party, above; if not, they will be encouraged to consider subscribing in the future.)
- ?? Already a subscriber, in which case the call is ended as quickly as possible.

Use the sample script to practice navigating a script.

Note: Although scripts are not linked to a particular level or database, you have the option of including fields from the current level (and higher) of the currently open database when you create a script. If you use the script in another database, this field information will not be available.

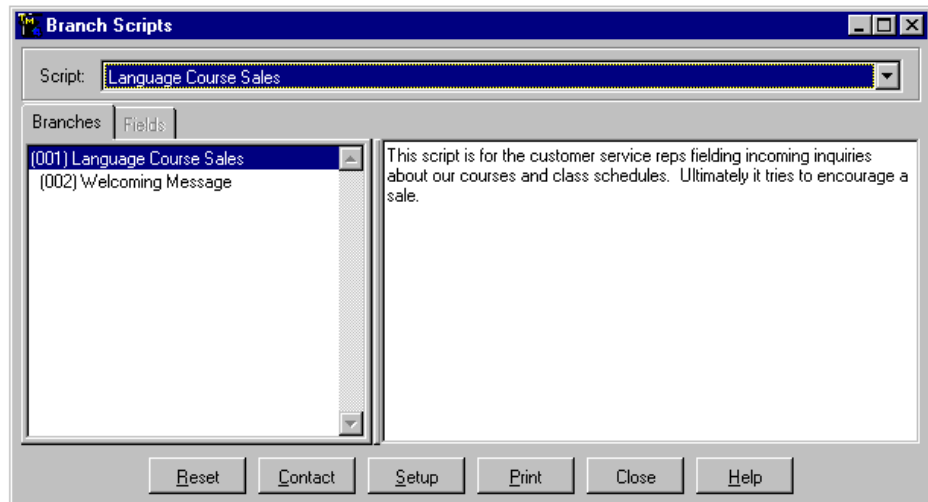
To Navigate Through a Sample Script:

Note: The New Subscriptions script was based on Level 2 of the Company/Contact database.

1. From the **Office** menu, select **Branch Scripting**.

or Click the Branch Scripting icon on the toolbar, if configured: 

The Branch Scripts dialog box will open, showing the first branch of the first script:



Sample Branch Scripts Dialog Box

2. From the **Script:** drop-down list, choose the script that you want to explore.

Note: To follow the documented examples, use the sample script **New Subscriptions**.


3. This screen is principally composed of two large fields. They work together as follows:

?? The field on the left side of the Branch Scripts screen can display either the branch structure of your script or the contents of any fields associated with the selected branch. To display the associated field information, click the **Fields** tab. If the **Fields** tab is not available, there are no fields associated with the selected branch. You can use this display feature to edit the contents of any associated field.

- ?? The field on the right side of the Branch Scripts screen displays the text of the selected branch. You can change the relative sizes of the two fields by moving your cursor over the dividing bar and, when your cursor changes to the double-headed arrow, clicking and dragging the dividing bar to the desired position.




Hint: If the full name of a branch does is not displayed because the field is too narrow, move your cursor over the branch name. A ToolTip will open displaying the full name.

- ?? Clicking any branch will make it the current branch. Its script will then be shown in the **field on the right**. Double-clicking any branch will toggle whether its child branches are displayed in the field on the left, if the branch has child branches.
- ?? Clicking **C**ontact will switch you over to the current contact record without losing your place in the script. To return to the Branch Scripting dialog box, click the Branch Scripting icon (if configured): . Or, select **Branch Scripting** from the **Office** menu. You will be returned to the place in the script where you left off.
- ?? You can return to the previous branch by clicking on it in the field on the left side of the screen. You will not be able to return to the previous branch if the child branches of the selected branch are open in the tree view. Double-click the selected branch to close its child branches in the tree view.
- ?? Clicking **R**eset will bring you back up to the primary branch of the current script, and create the activity if you have selected that option.
- ?? Clicking **S**etup will allow you to create a new script or modify an existing script. This option is only available to supervisor users.
- ?? Click **C**lose to close Branch Scripting.

To Make a Call Using a Script:

1. From the Contact Manager, display the record for the contact that you want to call.
2. Use the Dialer feature to dial the phone and access the Call Notes dialog box.
3. From the **Office** menu, select **B**ranch Scripting.

or Click the Branch Scripting button on the toolbar: .

The Branch Scripts dialog box will open, showing the first branch of the topmost script.


4. Select the script that you want to use during your call from the **Script:** drop-down list.
5. Read the text of the current branch as it appears in the field on the right side of the screen.

6. To adjust the size of the viewing window, move your cursor over the dividing bar between the left and right sides of the dialog box. When the cursor changes to the double-headed arrow, click and drag the dividing bar to the desired position.
7. When you are ready to move to the next branch, click on the appropriate branch in the tree view. This will normally be based on the response of the contact. If the child branches of the current branch are not open, double-click on the current branch to open them.
8. Continue clicking child branches and reading the branches' text until you reach the end of your script (the script may have several ending points depending on its construction and purpose).
9. You can click **C**ontact to switch to the current contact record and enter data directly into your database anytime. Click the Branch Scripting icon on the toolbar to return to your script.

or Click on the **F**ields tab to access any fields associated with the selected branch. You can edit these fields as necessary. Use the scroll bars to locate the field you need to edit. Change the size of the Fields page as in step 6. Click on the **S**ave **F**ield **C**hanges button to save the changes to the database. If this is a memo field, the information will be appended to the existing field information, along with a notepad stamp containing the date, time and User ID. With any other field type, this information will overwrite the existing information. If the field has a list box, place your cursor in the **I**ntput field and press F2 to select the text to input from the field's list box.


Note: Only fields applicable to the current database level and above will be included in the list. (e.g., If you have included fields from another database, those fields will not be displayed.)

Note: You will only be able to input data that is valid for this field. For example, only dates in a date field, numbers in a numeric field, etc. If this field is validated by list or expression, TeleMagic will check the validity of your entry just as it would if you were inputting the data directly from the Contact Manager.

- or** Switch to the Call Notes dialog box and add comments by clicking the Dial button  on the User Toolbar (if configured), or selecting **O**ffice, **D**ial **N**otes from the main menu. Click the Branch Scripting icon on the toolbar to return to your script.
10. When the call is complete, switch to the Call Notes dialog box (by clicking the Dial button on the toolbar), and click **T**erminate.
11. Add any extra notes in the **C**omments field if necessary, and click **S**ave.
- or** To set a recall, click **S**et **R**ecall.
12. If you will not be making another call, return to the Branch Scripting dialog box and click **C**lose.

- or** To place another call, go to the record of the contact you want to call and dial the phone.
- 13. If you will be using the same script, click **Reset** and follow steps 5 through 9.
- or** To use a different script, select the script from the **Script** drop-down list and follow steps 4 through 9.

To Answer a Call Using a Script:

1. Answer the phone following the instructions in the *Answering the Phone* section of the *Dialer* chapter of this guide.
 2. Determine the purpose of the call.
 3. If there is a script applicable to the subject of the call, select **Branch Scripting** from the **Office** menu.
- or** Click the Branch Scripting icon on the toolbar: .
4. Follow steps 4 through 13 under the heading *To Make a Call Using a Script*, above.

WORD PROCESSING

Word Processing in TeleMagic

TeleMagic's word processor integration feature creates a seamless link between TeleMagic and some of the most popular word processing programs: Microsoft Word, Lotus Word Pro, and Corel WordPerfect.

You can set up as many different word processors as you require. Then, when you create a new document, you will select one of the word processors from a drop-down list. The chosen word processor will open with the appropriate merge tools available.

Merging with TeleMagic

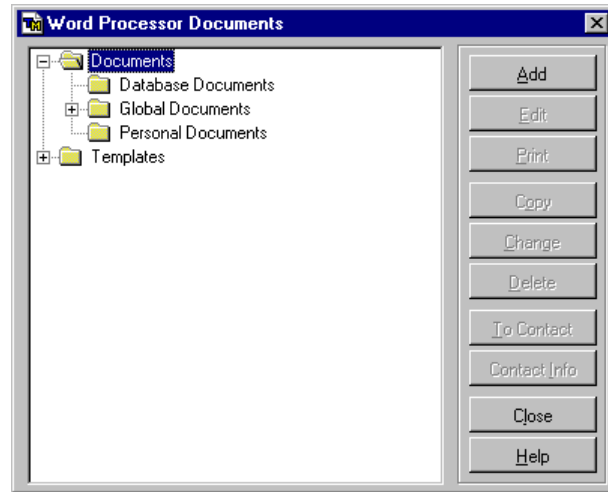
The link between TeleMagic and your word processor allows you to use your word processor in conjunction with your database to easily produce merge documents using contact data which has been selected based on your filter criteria. You can print your merge documents and mail them, or you can attach them to e-mail messages in TeleMagic Internet Mail. When you e-mail merge documents, the merging process is always performed by the Automation Server.

Merge fields are special blocks of text that appear in the document in a format similar to this: <<Contact_Name_LVL2>>. This example references the information contained in the Contact Name field on Level 2. When a document is printed, it is printed for either a single contact or for all contacts in a filter. As TeleMagic prints the document, it will look for merge fields and will insert the information in the specified field from the contact record into the merge field. In this way, you can have one document that goes to any number recipients, and have it contain information specific to each one. In addition to merge fields, directives are also available. There are 5 fax directives available, and the User Name and User ID directives, which are based on the cUserName and cUserID variables, respectively.

Note: TeleMagic for Windows versions 1.0 and 1.5 placed the level before the field name. This was changed for subsequent versions, but there were options that allowed the continued use of this format. This format is not recognized by V5. The merge fields in any documents that follow the older format must be replaced to conform to the new format: *fieldname_LVLn*.

Word Processor Document Selection Box

When working with TeleMagic's word processing feature, the main screen you will use is the Word Processor Document selection box:



Word Processor Document Selection Box

This selection box provides a tree view of your documents and templates, and whether they are global, database, or user-specific. From here you can work with existing documents by finding the document description, or you can add new documents.

When documents are created through TeleMagic you establish two things: the document and the document description. The document is the actual file. This file can be stored in any location you like and accessed from outside TeleMagic. The document description is the description of this document that TeleMagic references. When you want to access a document, you do not have to give TeleMagic the file name, the path to the document, and what word processor to use. This is all stored in the document description.

TeleMagic sorts document descriptions automatically. When you open the Word Processor Document selection box, you will see the documents that were created in each word processor.

Templates are also managed from this dialog box. Templates are used to keep you from having to duplicate work. For example, if you use the same heading for all form letters, you can create a form letter template that uses that heading. When you later add documents, you can base all form letter documents on that template. The heading will be automatically entered into the document based on the template. When you access the Word Processor Documents selection box, you will be usually be working with your documents. If you need to view or edit any of your templates, you can expand the **Templates** folder.

Documents and templates are further sorted into three lists: a personal list, a database list, and a global list. As each document (or template) is created, it is assigned to one of these lists. If you have documents that should only be printed from a specific database, store them on that database's list and they will only be accessible from that database. Anyone with access to a database will be able to access any associated documents. If you have documents that you want to keep personal, store them on the personal list and only you will be able to access them. If you have documents that can be used in multiple databases and that you want to share with all users, store them on the global list.

Note: If you use more than one version of Microsoft Word, documents created in the earlier version may open as documents in the later version. This will happen if you have the later version running when you open the document created on the earlier version.

Creating Documents and Form Letters Using the Merge Feature


The merge feature is the link between TeleMagic and the high-level word processors. This feature allows you to create documents and templates in any of the supported word processors.

Creating a Merge Document or Template

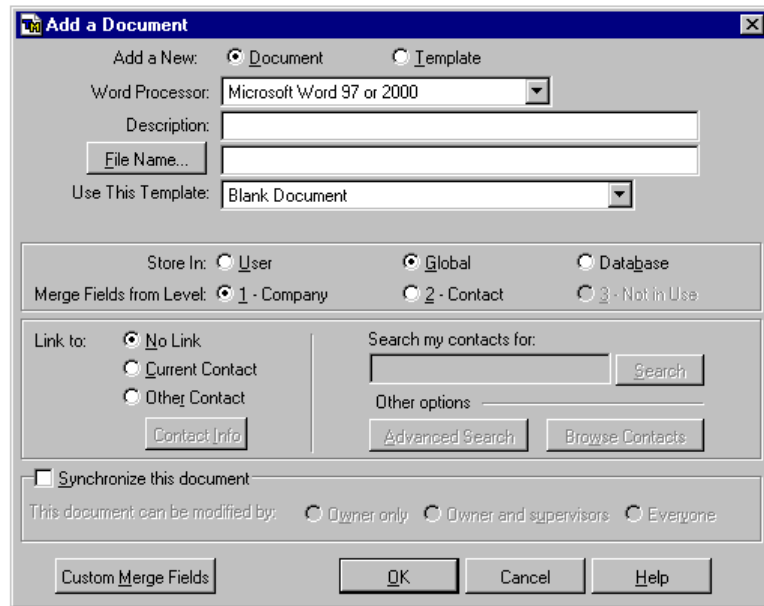
Note: TeleMagic must be configured to recognize where your word processor is installed. You can configure as many word processors as you wish. See the online help for instructions on setting up word processors.

Creating a merge document or template is a two-step process. First, you have to add the document in TeleMagic. This includes giving the document a description, a name, and defining additional particulars concerning the document. This step will be the same no matter what word processor you are using. The second step is creating the document in the word processor. This step will vary depending on what word processor you are using.

To Add a Document or Template:

1. From the **Write** menu, select **Word Processing**.
or Click on the word processor tool .
The Word Processor Documents selection box will open.
2. To create a new document or template, click **Add**.

The Add a Document dialog box will open:



Add a Document Dialog Box

3. Use the **Add a New** radio buttons to determine whether the new item will be a Document or Template.

Note: If you are adding a template, the **Use This Template:** drop-down box will be disabled.

4. Select the Word Processor for the document from the Word Processor drop-down list.
 5. In the **Description:** field, enter a description of the file as you want it to appear in the Word Processor Document selection box. (This is not the actual file name; it is a description to help you recognize the file in the future.) The description can contain spaces and special characters.
 6. Type the name of the file in the **File Name...** field. This is the actual file name under which the document will be stored. The path to the file will default to your Writing preferences, **Working Directory** selection. If you want to use a different path, enter it in the field. Enter a file name following the path. The file name must follow your operating system's file naming requirements with regard to acceptable characters, length, and file name extension.
- or** Click **File Name...** and use the standard Windows File Open dialog box to select an existing document. (The document must have been originally created using TeleMagic's merge feature in order to merge correctly.)

If you are adding a document, the **Use This Template:** drop-down list will be available.

7. If you want to base your document on an existing template, select it from the **Use This Template:** list. This list will only include templates stored in the same location (user, database, or global).
8. Choose from the **Store In:** radio buttons to control how the document or template will be accessed.

Note: This will default to the list you are currently viewing in the Document selection box.


??If you want the document to appear on your user-specific list of documents and templates, select the **User** radio button. You will be the only user with access to this document or template.

??If you want the document or template to appear on the global list of documents and templates, select the **Global** radio button. All users who are using the selected word processor will have access to this document or template.

??If you want the document or template to appear in the database-specific list of documents and templates, select the **Database** radio button. The document or template will be available to any users who are working in the current database with the selected word processor.

9. Choose a level with which to associate your merge document from the **Merge Fields From Level:** radio buttons. (These radio buttons will reflect the names of the levels in the current database.) Choose the lowest level from which you intend to pull fields. For example, if you will be using fields from Levels 1 and 2, select the Level 2 (**Contact**) radio button at this point. Do not choose Level 3 if you will not be using fields from Level 3.
 10. If you are using Data Synchronization Server, and you want to synchronize this document with other sites, mark the **Synchronize this document** checkbox. When this option is marked, radio buttons become available which allow you to restrict which users can modify the document. Your choices are: only the originator, the originator and supervisors, and everyone. For more information on synchronizing documents, see the *Data Synchronization Server* guide and the Data Synchronization Server online help.
 11. When satisfied with your selections, click **OK**.
- or** If you want to link the document to a contact, proceed to the next section. If you want to use Custom Merge Fields, proceed to the section *Using Custom Merge Fields*.

Linking Documents to Contacts

If you are creating this document for a specific contact, you may want to link it to the contact's record. The description of the document will be added to the list of linked documents for this contact that can be accessed from a rollup list or the **View linked documents for this contact** button  on one of the Contact Manager Toolbars.

Note: This button is included on the Primary Contact Manager Toolbar by default. If you have removed it, you can open the list from the Contact Record menu and select **Rollups, Letters**.

Also, when a document is linked to a contact, you will be able to access the contact record directly from the Word Processor Documents dialog box. You can view the contact's key field information, go directly to the contact record, and print the linked document without first having to open the document.

There are five ways to link a document to a contact:

- ?? Link the document to the current contact.
- ?? Link the document to a contact on the current level using **Search**.
- ?? Link the document to a contact on the current level using **Browse Contacts**.
- ?? Link the document to a contact on a different level or in a different database using **Advanced Search**.
- ?? Link the document to a contact on a different level or in a different database using **Browse**. (Accessed from the Advanced Contact Search dialog box.)

There is a separate procedure for each method. The simplest method is linking to the current record. If you need to link to some other record, you should use one of the procedures which search for the record. In order to search for a record in the current level, you must know some information about the record. The information must be stored in a field which is included in the expression of an index which has been set up for Multiple Index Search.

To link the document to a record in a level or database other than the current one using Advanced Search, you will need to know where the record is stored and some information about the record. The information you will be searching for must be contained in a field which is part of an index expression in the database where it is located.

To link the document to a record using either of the options using the Browse function, you will need to know where the record is stored, and you must be able to recognize the record when it is displayed along with other records in the same database and level.

When you have determined which method you will be using, go to the appropriate procedure:

To Link a Document to the Current Record:

1. Open the Word Processor Documents dialog box, select the document, and click **C**hange, or click **A**dd to create a new document.

The Change Document Description or Add a Document dialog box will open. If you are adding a new document, see the preceding section for instructions on using this dialog box.

2. In the Link to: section of the dialog box, click **C**urrent Contact.

The document will be linked to the current record. Click **C**ontact **I**nfo to open a message box with the linked contact's information.

To Link a Document to a Record in the Current Level using Search:

1. Open the Word Processor Documents dialog box, select the document, and click **C**hange, or click **A**dd to create a new document.

The Change Document Description or Add a Document dialog box will open. If you are adding a new document, see the preceding section for instructions on using this dialog box.

2. In the Link to: section of the dialog box, click **O**ther Contact.

The **S**earch field will become available.

3. Enter the information you are going to search for in the **S**earch field. You do not have to include the entire piece of information, the first few characters will usually be sufficient.

4. Click **S**earch.

The document will be linked to the first record which meets the criterion entered in step 3. If no match is found, you will be given the option of searching for the record using **B**rowse.

To Link a Document to a Record in the Current Level using Browse:

1. Open the Word Processor Documents dialog box, select the document, and click **C**hange, or click **A**dd to create a new document.

The Change Document Description or Add a Document dialog box will open. If you are adding a new document, see the preceding section for instructions on using this dialog box.

2. In the Link to: section of the dialog box, click **O**ther Contact.

3. Click **B**rowse **C**ontacts.

The Select Contact dialog box will open. This is a standard Browse window listing all records on the current level.

4. Scroll through the list until you find the desired record.
5. Highlight any field of the record and click **Select**.

The document will be linked to the selected record and the Select Contact dialog box will close.

To Link a Document to a Record on a Different Level or Database using Search:

1. Open the Word Processor Documents dialog box, select the document, and click **Change**, or click **Add** to create a new document.

The Change Document Description or Add a Document dialog box will open. If you are adding a new document, see the preceding section for instructions on using this dialog box.

2. In the Link to: section of the dialog box, click **Other Contact**.
3. Click **Advanced Search**.

The Advanced Contact Search dialog box will open:



Advanced Contact Search Dialog Box

4. Enter the information to search for in the Search for: field.
The **Search** button will become available.
5. Select the database containing the record you are searching for from the **Database:** drop-down list.
6. Select the level containing the record you are searching for from the **Level:** drop-down list.
7. Select an index which includes the field containing the search criterion as the first field of its expression from the **Index:** drop-down list.

8. Click **Search** when you are ready to search for the record. The document will be linked to the first record which meets the search criterion. If no match is found, you will be given the option of browsing for the record.

To Link a Document to a Record on a Different Level or Database using Browse:

1. Open the Word Processor Documents dialog box, select the document, and click **Change**, or create a new document.

The Change Document Description or Add a Document dialog box will open. If you are adding a new document, see the preceding section for instructions on using this dialog box.

2. In the Link to: section of the dialog box, click **Other Contact**.
3. Click **Advanced Search**.

The Advanced Contact Search dialog box will open.

4. Select the database containing the record you are searching for from the **Database:** drop-down list.
5. Select the level containing the record you are searching for from the **Level:** drop-down list.
6. Click **Browse**.

The Select a Contact dialog box will open. This is a standard Browse window listing all of the records in the level (selected in step 5) of the database (selected in step 4).

7. Scroll through the list until you find the desired record.
8. Highlight any field in the record and click **Select**.

The document will be linked to selected record. The Select a Contact dialog box will close.

Using Custom Merge Fields

Custom Merge Fields are used to insert information into your merge documents which is not stored in your database. For example, if you conduct meetings with a group of contacts at irregular intervals in a variety of different locations. In this case, you would need some way of including the date, time, and place for the upcoming meeting. Custom Merge Fields are document-specific; you must create a set of Custom Merge Fields for each document that you will be using with this feature.

Note: The Custom Merge Field feature should only be used with documents that are to be printed or faxed. Documents containing custom merge fields should not be included as attachments to e-mail messages.

To Create Custom Merge Fields:

1. From the **Write** menu, select Word Processing.

The Word Processor Documents dialog box will open.

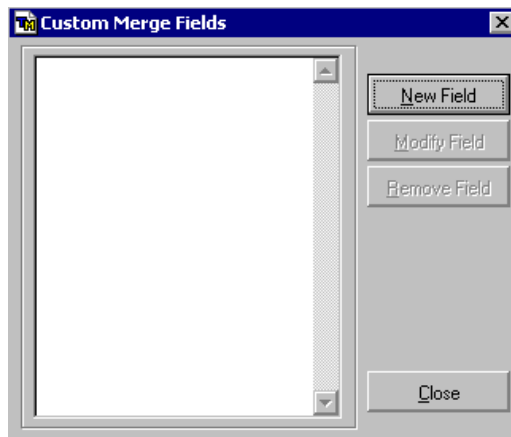
2. If you are creating a new document, click **Add** and create the new document according to the instructions in the *To Add a Document or Template* topic.

or Select the document with which you will be using the Custom Merge Field(s) from the list and click **Change**.

The dialog box opens will depend on whether you are creating a new document or template, or are changing an existing one.

3. Click **Custom Merge Fields**.

The Custom Merge Fields dialog box will open:



Custom Merge Fields Dialog Box

4. Click **New Field**

The Add a Merge Field dialog box will open.

5. Enter the name of the new merge field in the Field Name: field.
6. If this will be a memo field, mark the This is a memo field checkbox.
7. Click **OK**.

The Add a Merge Field dialog box will close and the new Custom Merge Field will be added to the list of Custom Merge Fields.

8. Repeat steps 4 through 7 for each additional Custom Merge Field that you want to add to this document.

9. Click **C**lose.

The Custom Merge Fields dialog box will close.

To Use Custom Merge Fields:

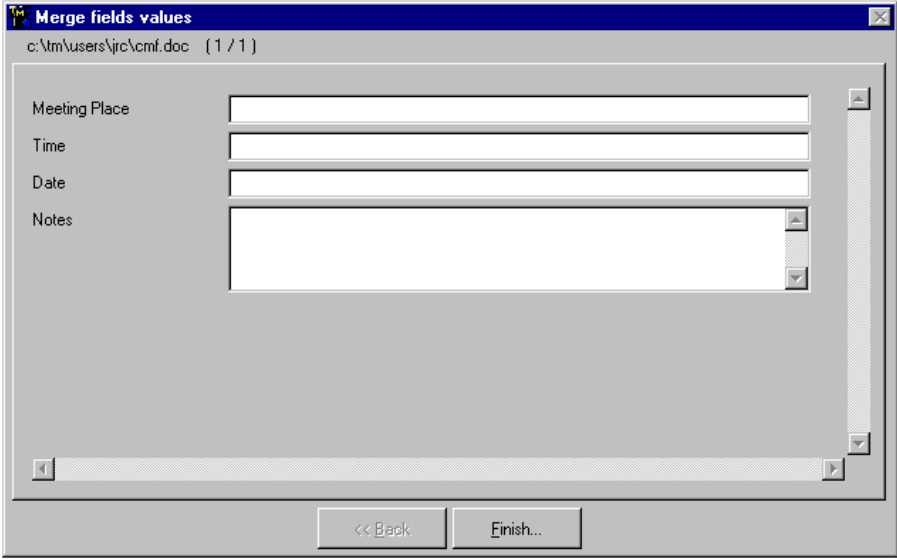
1. From the **W**rite menu, select Word Processing.

The Word Processor Documents dialog box will open.

2. Select the document containing the Custom Merge Fields.

3. Click **P**rint.

The Merge Fields Values dialog box will open:



Sample Merge Fields Dialog Box

4. Enter the required information in the available fields. This will depend on what fields you have created and how they are used.

Note: Memo fields can contain essentially unlimited text. Non-memo fields are limited to 80 characters.

5. When all required information has been entered, click **F**inish.

The Merge Fields Values dialog box will close and the Print Options dialog box will open.

6. Complete the printing process. See the online help for more information on using the Print Options dialog box.

The document will be printed with the custom merge information inserted.

When You Have Finished Setting Up or Changing Your Document

You will be placed in your word processor. If your word processor is not already open, it will be launched. If your word processor is already open, you will be switched to that screen to create the document or template.

Documents and templates are created using a combination of text and merge information. Each word processor has a slightly different method of allowing you to insert merge fields into your document, but the following rules will apply to all word processors:

The merge field list will display all available fields from the level selected for the document and higher. The level on which each field appears in the database will be indicated by a prefix or suffix (depending on the Merge Field Format selected in Writing preferences) of LVL1, LVL2, or LVL3 in the list.

Important points concerning merge fields:

- ?? The first five options on the merge field lists are directives used for documents that will be faxed.
- ?? When you added the document, you selected a level with which to associate the document. You will not be able to select fields from a level lower than the selected merge level.
- ?? OLE fields will not be available for merging.
- ?? Logical fields (checkbox fields) will return “Yes” or “No” when merged.
- ?? The User Name directive is based on the cUserName variable, and the User ID directive is based on the cUserID variable. These directives are listed immediately after the fax directives.

Select your word processor from the following list and follow the instructions for inserting merge fields:



If you are using Microsoft Word 97 or 2000:

Word 97 will open and you will see that the mail merge toolbar has been added. Place your cursor in the document where you want information from a merge field to appear and click **Insert Merge Field**. A merge field list will open:



Microsoft Word Insert Merge Field Dialog Box

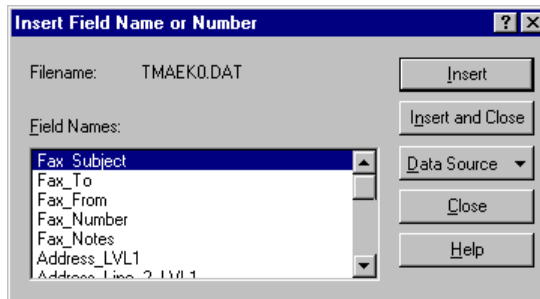
Word 97 uses a drop-down list instead of a dialog box. There is also a drop-down list for the Word Fields.

Click on any field to insert that TeleMagic field into your new document. When you have finished creating your document, close it and return to TeleMagic.



If you are using WordPerfect 8 or 9:

WordPerfect will open, showing a print merge toolbar. Click **Insert Field** to start the conversion process. An Insert Field Name or Number dialog box will appear:



WordPerfect Field Name List Box

Place your cursor in the document where you want information from a merge field to appear. Select the name of any field and choose **Insert** to insert that TeleMagic field into your new document. When you have finished adding the document, close it and return to TeleMagic.



If you are using Lotus WordPro 97 or 2000:

WordPro will open with the WordPro Merge Assistant open. Compose the letter or template and insert merge fields by selecting them from the list on the Merge Assistant. Click **Done** when finished. The Merge Assistant will proceed to step 3. From the Merge Assistant dialog box, select from the available options.

Quick Letter

Once you are familiar with adding documents in your selected word processor, you can choose to perform a quick add using the Quick Letter feature. Quick Letter bypasses the main Add a Document dialog box. You are instead given an Add a Letter... dialog box where you can define the description and name of the document. The document will be added in the User list to the current merge level, and linked to the current contact.

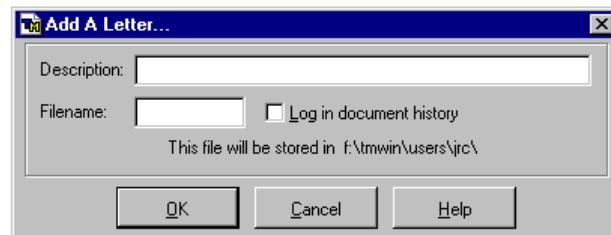
In addition, Quick Letter saves you even more time by automatically placing the current date, as well as the contact name, address information, and salutation from the current record at the beginning of your document. However, to have this information automatically inserted into your Quick Letter you must have previously set up Standard Address in Database Preferences. Quick Letters are created using your default word processor.

Note: The date and salutation are optional. To stop these from being included, unmark the Include the current date and Dear Field in the Quick Letter header checkbox on the Writing page of the Preferences dialog box.

To Create a Quick Letter:

1. From the **W**rite menu, select **Q**uick Letter.

The Add a Letter dialog box will open:



Add a Letter Dialog Box

2. Enter a description for your document in the Description: field.
3. Enter a file name for your document in the Filename: field.

Note: Documents added using Quick Letter are stored in your default working directory path established in Writing preferences.

4. Click **OK**.

You will be taken into your default word processor. Today's date will be automatically inserted at the top of the page according to your date format

preference. If your Standard Address has been set up for the current database level, the contact's name and address information will be inserted below the date. Finally, the salutation, based on your preference, will be automatically inserted below the name and address.

5. Add the body of the document and complete the letter as required by your word processor.

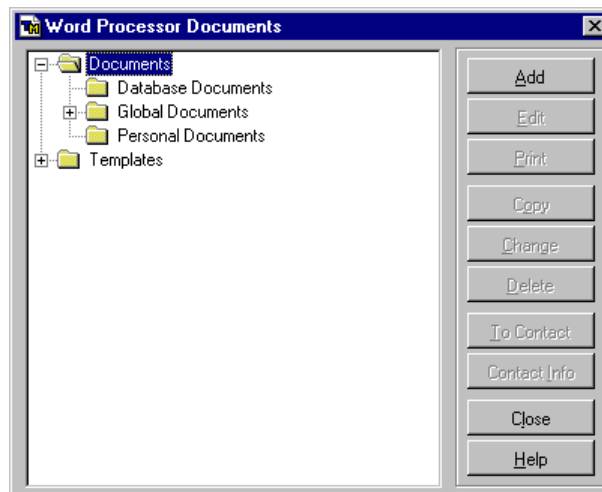
Starting a Mail Merge

In order to start a mail merge, you should already have created a document in the word processor and included all merge fields and decided what contact or group of contacts should receive the letter.

To Send Form Letters Using TeleMagic and Your Word Processor:

1. From the **W**rite menu, select **W**ord Processing.

The Word Processor Document selection box will open:



Sample Word Processor Document Selection Box

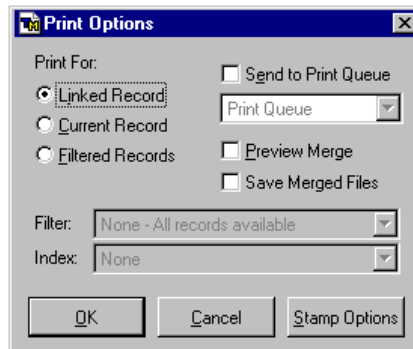
2. If you want to print a document, expand the **D**ocuments folder.
or If you want to print a template, expand the **T**emplates folder.

The word processor used to create each document or template is indicated by the icon associated with each document.

3. If the document you want to print is displayed in the list of documents, highlight it and click **Print**.
- or If the document you want to print is stored in another folder (user, global, or database), expand the appropriate folder within the **Documents** folder. When you locate the document, highlight it and click **Print**.

WARNING! There are two merge field formats available. The chosen format may result in problems if you are using merge documents created in previous versions of TeleMagic.

The Print Options dialog box will appear:



Print Options Dialog Box

4. If this document is linked to a contact record, select **Linked Record** to print for the linked record. (This radio button will be dimmed if the record is not linked.)
 - or Select the **Current Record** radio button to print for the current contact.
 - or Select **Filtered Records** to print for all records in a filter.
- If you select **Filtered Records**, the **Filter** and **Index** fields will become available. These will default to the filter and index currently active in the Contact Manager.
5. If you want to send the documents to a group of records other than the filtered group currently in use in the Contact Manager, select the appropriate filter from the **Filter:** drop-down list.
 6. If you want to print the documents in an order other than that defined by the index currently in use in the Contact Manager, select the appropriate index from the **Index:** drop-down list.
 7. If you are printing for the current or linked record and want to preview the document in the word processor before printing, mark the **Preview Merge** checkbox.

WARNING! If you are using WordPro and have merge fields contained in tables or graphics in frames, do not preview the merge document before printing.

If you have a queue named Print Queue at the TeleMagic Automation Server, the **Send to Print Queue** checkbox will become available. (This queue exists by default.)

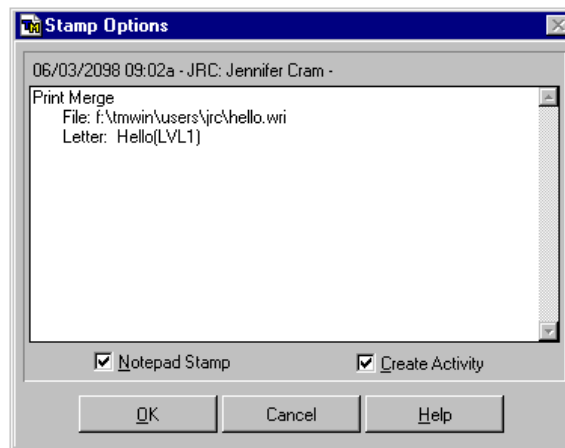
8. To send your document(s) to the Print Queue to be processed by the Automation Server, mark the **Send to Print Queue** checkbox. (This is useful when you want to print later, or if you offset the process of printing to another workstation.)
- or** If you want to print from your local workstation, leave this checkbox unmarked.
9. To retain a copy of each merge document sent, mark the **Save Merged Files** checkbox. These files will appear in the linked document list for the contacts they were sent to.

If you have **Stamp Notepad on Merge** or **Create Activity When Printing** selected in Writing preferences, the notepad and/or **Comments** field of the activity will be stamped with the date, time, User ID, and the document file name and description. You may edit portions of this stamp, if desired.

10. If you want to use the default stamp, skip to step 13.

or Click **Stamp Options**.

The Stamp Options dialog box will open:



Edit Notepad Stamp Text Dialog Box

The date, time, User ID, and user name must be included in all stamps for synchronization purposes. Any other information may be added to or removed as necessary.

11. Edit the text area as necessary.

If you have **Stamp Notepad on Merge** selected in Writing preferences, the **Notepad Stamp** checkbox will be marked by default. If you have **Create Activity When Printing** selected, the **Create Activity** checkbox will be marked by default.

12. Mark or unmark the checkboxes as necessary.

Note: If you have chosen to preview or save the merge document, pay close attention to the checkboxes. If these checkboxes are marked, TeleMagic will stamp the notepad and create the activity as soon as you select **OK** at the Print Options dialog box. If you are merely previewing or saving the document without intending to actually print, make sure these checkboxes are unmarked, or you will create an inaccurate print history.

13. Click **OK** to save the stamp information.

14. Click **OK** to print.

If you chose not to preview the merged document, your word processor will open and TeleMagic will send the command to print. Depending upon the word processor you are using, a print dialog box may open. If this occurs, click **OK** to send the document(s) to the printer. If this does not occur, the documents will be sent automatically. Exit the word processor when completed to return to TeleMagic.

Note: Before printing the document(s), TeleMagic attaches a file containing data from the contact record or filter that it uses to fill in merge fields. When you close the document, your word processor will register the fact that this file has been attached to the document and will give you the option of saving. Select **No**.

- or** If you are previewing the merged document, your records will be automatically merged with the document in your word processor. A message box will open showing the status of the merge.

If your word processor is not already open, it will be launched. If your word processor is already open, you will be switched to that screen for the merge.

15. Start the merge as follows:



If you are using Word 97 or 2000, select **File, Print...** from the Word menu.

The Windows Print dialog box will open. Change printer settings as required. (For more information on how to do this, see your Word for Windows Manual.) Choose **OK** to print your documents(s).



If you are using WordPerfect 8 or 9, as you enter WordPerfect, your TeleMagic merge will automatically be converted into a WordPerfect merge. During this process a conversion message will be displayed:

Select **File, Print...** from the WordPerfect menu and the WordPerfect Print dialog box will open.

Change printer settings as required. (For more information on how to do this, see your WordPerfect manual.) Choose **P**rint to print your document(s).



If you are using or WordPro 97 or 2000, select **F**ile, **P**rint... from the WordPro menu.

The WordPro Print dialog box will open. Change printer settings as required. (For more information on how to do this, see your Ami Pro manual.) Choose **O**K. Your documents(s) will print, along with the original version of your document, showing the merge fields used.

You will be at the Standard Windows Print dialog box. Change printer settings as required. Choose **O**K to print your documents(s).

Return to the Contact Manager by selecting **F**ile, **E**xit. You will be informed that the file has changed and asked if you want to save the changes. Click **N**o to return to the contact record.

FAXING

Getting Ready to Fax


If you are working on a network, your system administrator has probably set up your fax system. If not, you will need to configure your workstation for local faxing. In addition to setup for your fax system, there is some document preparation required before faxing. See the topic *Getting Ready to Fax* in the online help for more information.

Sending a Fax

Once you have created the documents to be faxed and a fax cover sheet, you are ready to send a fax.

To Send a Fax:

Note: If you are faxing a document created in Word for Windows 7, turn off automatic spell checking before proceeding.

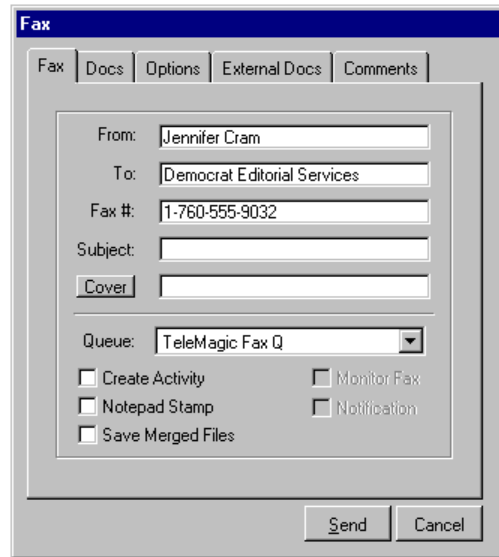
1. Go to the record for the contact you want to fax.
2. To send the fax to the number in the Fax Key Field for this database level, select **Send Fax** from the **Write** menu, or click the fax icon on the toolbar .

Note: If no fax field has been set up in Key Fields preferences you will receive a pop-up informing you that no fax key field has been defined. You will still be able to access the Send Fax dialog box, but you will not be offered a default fax number. Similarly, if the contact record from which you access the Send Fax dialog box has no fax number, you will not be offered a default.

- or** To send the fax to the current contact using any other fax field, click the fax icon next to the field.

Note: If there is a pipe character “|” anywhere in the fax number field, you will not be able to fax to this number. (Placing this character in a field allows you to maintain a record of the fax number, while preventing faxes from being inadvertently sent to it. This is particularly useful if you have received a request from a contact that no faxes be sent, especially if this request is for a limited duration, such as while the contact is on vacation.) When TeleMagic finds a pipe character in the field it is being requested to use to send the fax, the Send Fax dialog box will be unavailable when that record is displayed. If you are faxing to all contacts in a filter, any fax numbers containing a pipe character will be skipped.

The Fax dialog box will open:



The image shows a 'Fax' dialog box with a blue title bar. It has five tabs: 'Fax' (selected), 'Docs', 'Options', 'External Docs', and 'Comments'. The 'Fax' tab contains several text input fields: 'From:' (filled with 'Jennifer Cram'), 'To:' (filled with 'Democrat Editorial Services'), 'Fax #:' (filled with '1-760-555-9032'), 'Subject:', and 'Cover:'. Below these is a 'Queue:' dropdown menu set to 'TeleMagic Fax Q'. At the bottom left are four checkboxes: 'Create Activity', 'Notepad Stamp', 'Save Merged Files', 'Monitor Fax', and 'Notification'. At the bottom right are 'Send' and 'Cancel' buttons.


Sample Send Fax Dialog Box

The **From:** field will be filled in automatically with the name of the user currently logged into TeleMagic. The **To:** and **Fax #:** fields will be filled in automatically with information from the contact record, based on your Key Fields preferences. (If there is no information in the specified field in the Contact Manager, or if the key field has not been defined, no default will be offered.)

Hint: You can attach a list box to any of the text fields on the Fax or Docs pages of this dialog box. For example, attaching a list box to the **Cover** field can be useful if you have a selection of cover letters you use, as it saves you from having to enter the path and file name manually.

3. Edit the default **From:**, **To:**, and **Fax #:** information, if necessary.

Note: If you are faxing from your local workstation, the **Fax #:** field contains the exact numbers TeleMagic will use to send the fax. Any Dialer Setup preferences you have will be used when this dialog box first appears. (For example, if your local area code is 707, and the fax number begins with the area code 707, the 707 will not be included as part of the fax number in the Fax dialog box.) TeleMagic will not reference your Dialer preferences beyond offering the initial default. If you make any changes to the contents of this field, the number will be dialed as it appears. (For example, if you place 707 back in the field, it will be dialed, even if it is your local area code.) If you are faxing to the queue, TeleMagic will list the number exactly as it appears on the contact records. When the fax is sent, TeleMagic will compare this number to the Server settings. It will not reference your local preferences.

 **Hint:** If you will be sending the fax to a queue, but currently have the **Send-Local** option chosen, change to the queue *before* editing the **Fax #:** field. When you send locally, TeleMagic reads your Preferences to determine if the number is local or long-distance. When you send to the queue, it reads your server's settings. If you are able to send locally, when you open the Send Fax dialog box, the fax number will be based on your Preferences. If you then change to a queue, TeleMagic will go back to the Contact Manager for the actual number so the server's settings can be applied when the fax is sent. When this occurs, any edits you have made to the **Fax #:** field will be lost and will have to be re-entered.

4. If you have included the directive **Subject:** in the document to be faxed, enter a brief explanation of the subject of the fax in the **Subject:** field. (If you are not using the **Subject:** directive, any entry in this field will be ignored.)
5. If you are including a separate cover sheet, enter its path and file name in the **Cover** field. If you do not know the path and file name, click **Cover** to locate the file using the Windows Open dialog box. (TeleMagic will remember what document you enter in the **Cover** field and offer it the next time you send a fax.)

Note: If you are posting the fax to the queue, make sure the cover letter file (as well as any other document files) is in a location accessible to the workstation where the fax will be processed.

6. If you want the fax to be processed by the server, select the appropriate queue from the **Queue:** drop-down list.
- or** If you have a faxmodem at your workstation and are not faxing to a filter you may choose to send the fax immediately.



Sample Queue List

Note: The **Send Immediately (Local)** option will not appear on this list if you do not have a faxmodem configured at your workstation or if you did not mark the **Use Local Faxmodem** checkbox in Fax preferences.

7. Use the checkboxes as follows:

Note: These checkboxes will default to the selections you made in faxing preferences. They can be edited as necessary for individual faxes.

Select **Create Activity** if you want TeleMagic to create an activity with the type **LetterFax** and the status **Completed** in your Activity Manager. The activity will

be linked to the contact being faxed. (If you are sending the fax to a filtered group of records, an activity will be created for each contact in the filter.)

Note: To avoid overloading your Activity Manager, the activity will not appear on your calendar. It will be available from Browse in the Activity Manager, and when you create reports. It will also appear on any activity lists for the contact, and in the contact's document history.

Select **Notepad Stamp** if you want a "Sent fax" note stamped in the contact's Notepad Key Field. (If you have a memo field selected as your Fax Stamp Key Field, selecting **Notepad Stamp** will cause the same stamp to be placed in both memo fields.)

Note: If you are faxing locally, and you select **Create Activity** or **Notepad Stamp**, the process will be interrupted briefly as soon as the fax is sent, while TeleMagic creates an activity and stamps the contact's notepad. Faxes sent successfully from the queue will stamp notepads and create activities without causing any interruptions.

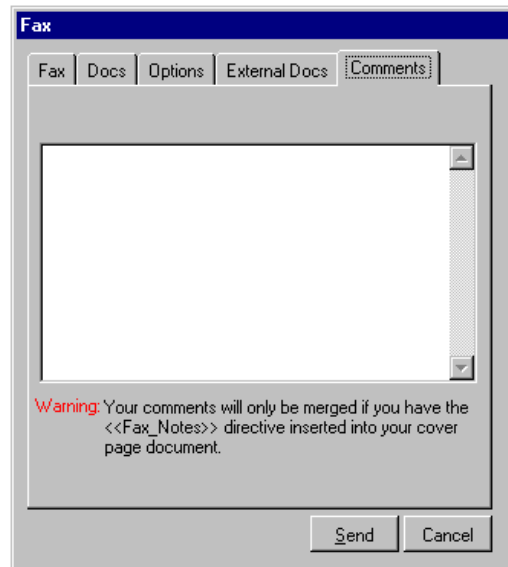
Select **Monitor Fax** if you want TeleMagic to display the status of the fax as it is being sent. (**Monitor Fax** is only available if you are faxing locally.)

Select **Notification** if you want a pop-up to appear notifying you on completion of the fax. (**Notification** is only available if you are faxing locally.)

Note: While a fax is being monitored, you will not be able to work in other areas of TeleMagic. If you are doing a lot of local faxing, we recommend that you select the option to receive notification upon completion.

8. If you have included the **Fax Notes** merge field in the document to be faxed, click the **Comments** tab.

The Fax Comments page will open:



Fax Comments Page

7. Enter the text you want merged into the Fax Notes directive. This field can hold an essentially unlimited amount of data.

Note: If you are using a cover letter created in Ami Pro, it will not recognize paragraph markers entered in the comments. It will translate paragraph markers (carriage returns) into spaces, so everything you type will be faxed as one paragraph.

8. Click the **Options** tab to access the Fax Options page:

Fax Options Page

The Fax Options page allows you to further define specifics concerning this fax.

Note: The checkboxes will default to the selections you made in Fax preferences. They can be edited for individual faxes if necessary.

??The **Delay Until: Date:** and **Time:** options allow you to instruct TeleMagic to wait until the specified time and date to begin processing the fax. It will remain in the queue with the status **Hold** until that time. This option is only available if you are sending to the queue.

??**Priority:** allows you to adjust the priority of the fax in the queue. The default priority is 2. Priority 1 faxes will be sent to the top of the queue, followed by priority 2 faxes, then priority 3 faxes. This option is only available if you are sending to the queue.

Note: Only supervisor users will be able to select Priority 1 for their faxes.

? Select **Email Notify** if you want TeleMagic to send you an E-mail message when the fax is successfully sent.

??Select **Email On Failure** if you want to be notified by E-mail in the event of an unsuccessful fax.

??Select **Stamp Documents** if you want a record of the documents sent with the fax, including the path and filename. (If you are including TeleMagic reports or external documents, this will also include the report or document description.) If you have chosen the **Create Activity** option on the Fax page of the main Fax

dialog box, this information will be stamped in the activity's **Comment** field. If you have chosen the **Notepad Stamp** option on the Fax page of the main Fax dialog box, this information will be stamped in the contact's notepad. If your Fax Stamp key field is a memo field, the information will be stamped in the designated field.

- ?? Select **Stamp Comments** if you want to record any cover comments. These comments will be stored in the same manner as the document names described above.

Note: If you are not creating an activity or stamping the notepad, and if your Fax Stamp Key Field is not a memo field, selecting either **Stamp Documents** or **Stamp Comments** will have no effect.

- ?? Select **Use Filter** if you want to fax to multiple contacts. (**Use Filter** is only available if you are posting the fax to the queue. It will be dimmed if you have **Send Immediately (Local)** selected in the Send Fax dialog box.) If you leave this checkbox unmarked, a single fax will be sent to the current contact. If you check this box the **Filter:** drop-down list will become active.

Select a filter from the list. The fax will be sent to every contact in the filter.

Note: When a fax is sent to all contacts in a filter, the fax number will be taken from your Fax key field. If you used the phone icon next to a fax field to access the Send Fax dialog box, you will receive a message informing you that the key field will be used instead of the field selected in the Contact Manager.

Note: Depending on the number of TeleMagic users, Automation Servers, and fax queues at your company, there could be a significant delay between the time that you send the fax to the queue and the time a server processes it. It is only when the fax is actually processed that TeleMagic evaluates the filter. Because of this, when faxing to a filter, you should not change or delete the filter until the fax has been sent. Also, if you make an edit to a contact record that moves it out of the filter, that contact will not receive the fax.

- ?? Select **Merge All Documents** if you want the Automation Server to search for merge fields in every document being sent and to open every document for each contact in the filter.
- ?? Select **Merge Cover Page Only** if your cover page contains merge fields, but the documents that follow do not. When selected, the cover page will be opened, merge fields will be replaced with contact data, then the cover page will be closed. (If you are faxing to a filter, this will occur for each contact in the filter.) TeleMagic will not search for merge fields in any documents following the cover page. If you are faxing to a filter, they will be opened only once and left open for all records in a filtered fax. (Since TeleMagic does not need to worry about merging data, there is no reason for the document to be opened separately for

each contact.) This option can dramatically shorten the time it takes to process faxes, especially those containing graphics.

- ?? Select **Do Not Merge Any** if your document(s) contain no merge fields. With this option selected, TeleMagic will not search for merge fields in the document(s). In the case of a filtered fax, it will open the word processor on the first fax in the filter to “print” the document, but will not look for merge fields and will not open it on subsequent faxes in the filter. Do not select this option if your documents contain merge fields.

Note: If you selected a filter, and you return to the Send Fax dialog box, the **To:** field will contain the name of the filter instead of the contact’s name, and all other information will be dimmed.

You have the choice of sending faxes from your local workstation (provided it has been set up to do so), or sending them to a queue where they can be processed by a server.

9. If you want to include any information in the fax in addition to the cover sheet, use the guidelines in the following sections when making your selections.

If you are faxing the cover sheet and additional documents you created in an outside word processor, see *Faxing Documents Created in Supported Word Processors*, below. Or, if you are only faxing the cover sheet, click **Send** to send the fax.

If you sent the fax to the queue, the fax will be queued.

The fax will remain in the queue until you start processing on the server. If the server is already processing your queue, the fax will remain until the server reaches that part of the queue.

If you have a local faxmodem and chose to send the fax immediately, a message box will open to report the status of faxing.

If you have included any documents from your word processor, it will be opened, the fax will be “printed” to the faxmodem, and the first attempt to send the fax will be made. If you chose to monitor the fax, a message box will open displaying the fax status.

Clicking **Abort** at this point will stop the fax in mid-transmission. If you chose not to monitor faxes, but you need to abort the fax, or watch its progress, hold down the ALT key and press TAB. Release the ALT+TAB keys when you see this:



In step 9, if you chose to be notified upon completion of the fax, you will receive a message once the fax has been processed.

Also, depending on your other choices, these events could also happen: creation of an E-mail describing the fax and its progress; creation of an activity linked to the appropriate contact; stamping of the contact's notepad or the **Fax Stamp** field. While the notepad is being stamped and/or the activity is being created, you will be notified. If for some reason the notepad could not be stamped or the activity could not be created, you will receive an e-mail explaining what happened.

Faxing Documents Created in Supported Word Processors

When faxing documents, TeleMagic needs to know where to find the outside word processor that is used to open the document. If you are faxing locally, you can do this through Writing Preferences. If you are faxing to the queue, you can set up word processors at the Automation Server.

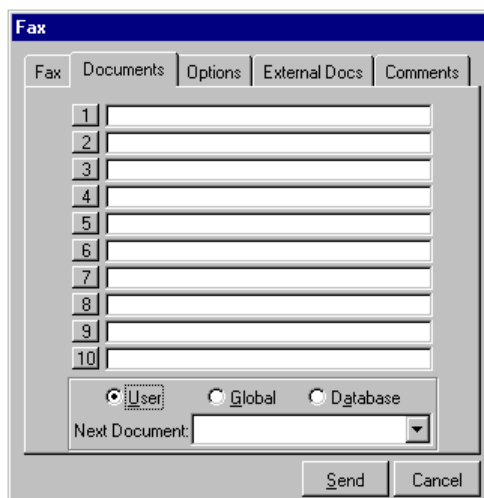
You can only fax files created in one of the word processors currently set up in Writing preferences. If you are using the Automation Server, the machine where the Automation Server is processing faxes needs to be able to access the documents you want to fax. In a network environment, for example, you should store documents on drives to which the Automation Server has access.

To Fax Additional Documents:

Prepare the fax as described in *To Send a Fax*, above. Before sending the fax:


1. Click on the **Documents** tab.

The Documents page will open.



The Fax Documents Page

2. If the document you want to fax was created from within TeleMagic in a Word Processor currently set up in Writing Preferences, select it from the **Next Document:** drop-down list.

 **Hint:** If the document you want to fax does not appear, it may be on another list. Use the User, Global, and Database radio buttons to toggle the lists of documents.

The filename and path to your selection will appear in the first **Documents To Fax:** field.

3. Click the number button next to the **Documents To Fax:** field if:

You are faxing locally and the document you want to fax was created in the word processor currently set up in Writing Preferences, but was not created within TeleMagic (i.e., is not a merge document);

or

You are faxing to the queue and the document you want to fax was created in a word processor that has been set up for use with the server that will be processing the queue. This can include both documents with merge fields and those without merge fields.

An Open dialog box will appear. The directory will default to your Writing Preferences Working Directory selection.

Note: In addition to text files, you can select graphic files with the extensions PCX, BMP, DCX, and TIF.

4. Select the document that you want to fax and click **Open**. It will appear in the Documents To Fax: field.

Note: If the document contains merge fields, it must be linked to the current database.

You can edit your entries in the Documents To Fax: fields in the same way you edit any text field. To remove an entry, use the mouse to highlight the entry and press BACKSPACE or DELETE.

5. When you have selected all of the documents that you want to fax, click **Send** to send the fax.

WIRELESS MESSAGING

Wireless Messaging with TeleMagic

If you are using TeleMagic to its full capacity, chances are you have the program running constantly. You have probably discovered that typing memos to send to co-workers, or interrupting your work session to go to another user's workstation to discuss an upcoming activity or a question is neither practical nor efficient. If so, you may have come to depend on e-mail, the Bulletin Board, the Message Taker, and the Activity Manager for the total solution to inter-office communication. You probably also enjoy the ease with which you are able to communicate with your clients, leads, and contacts using TeleMagic Internet Mail, and the dialer and faxing features.

TeleMagic has combined all of these communication features with the ability to send wireless messages from TeleMagic to a pager. You can inform co-workers of e-mail and activities as soon as they are created. If an urgent situation arises, you can contact anyone with a pager instantly, and include as many details about the situation as necessary to insure a prompt response. You can page yourself and include important information such as addresses and phone numbers. You no longer have to copy information to paper and worry about losing or forgetting it. TeleMagic will copy the information to your pager automatically, giving you the comfort of knowing that as long as you have your pager, you have the information available.

Using Wireless Messaging

There are a number of ways that Wireless Messaging can be used with other features in TeleMagic:

- ?? You can notify users of activities assigned to them in the Activity Manager, or create activities for yourself and store details in your own pager to take with you. If the activity is linked to a contact, you can even include contact information in the message.
- ?? You can write e-mail to an individual or a group of users and send a wireless message notifying the users of the e-mail.
- ?? You can send a wireless message from any contact record and include information concerning the contact in the message.
- ?? You can send a wireless message to a specific contact in your database.


Sending Wireless Messages

Hint: There are three ways of accessing the Wireless Messaging dialog box: when creating an activity, when sending an e-mail, or directly from the menu or toolbar in the Contact Manager. When you send messages from the Activity Manager or e-mail, you will be sending them to TeleMagic users. When you send messages from the Contact Manager, you will have the choice of sending the messages to a TeleMagic user, a contact, or manually entering the receiver information.

Note: In order to send messages to TeleMagic users, those users must be set up in Wireless Messaging to receive messages. To send messages to contacts, you must have created fields in your database to contain your contacts' pager numbers and pager IDs.

To Send a Message:

Note: To send a message to a particular contact with wireless messaging fields set up in the database, open that contact's record before accessing Wireless Messaging.

1. From the **Office** menu, select **Send Wireless Message**.
- or** Click the Wireless Messaging icon on the toolbar: 
- or** In the Activity Manager, create an activity and mark the **Page Users** checkbox.
- or** In E-mail, write an e-mail message and mark the **Page Recipients** checkbox on the **Message** menu.

The Wireless Messaging dialog box will open:



Sample Wireless Messaging Dialog Box

Note: Contact information will appear by default in the message area if you have selected **Paste Current Contact Info** in Wireless Messaging preferences.

If you have accessed this dialog box from the Contact Manager and there are **Pager #** and **Pager ID** fields in the contact database, the **Send To:**, **Pager #:** and **Pager ID:** fields will default to information from the current contact record. This can be edited if necessary. Otherwise it will default to **Manual Entry**.

If you have accessed this dialog box from E-mail or the Activity Manager, **Send To:**, **Pager #:**, and **Pager ID:** fields will be based on the Mail Recipient (for e-mail) or the user to whom the activity is assigned. (If the e-mail or activity is assigned to a group, the **Pager #:** and **Pager ID:** fields will appear blank. The information will be referenced from the users' preferences when each page is ready to be sent.)

The message area at the top of the dialog box resembles a pager display. If you have created an e-mail or activity, the message may default to include information on the item.

2. Type or edit the contents of your message in the message area using standard word processing commands.

Note: You can add and edit text. However, formatting (such as carriage returns) will not be recognized.

3. To include contact information from the current contact record, click **Paste Cont. Info**. Contact information will be appended to the end of the current text.

The message length will be displayed at the bottom of the dialog box as you compose the message.

The **Send To:** field will show either the current contact, a user, a user group, or **Manual Entry**. If you have accessed this dialog box from the Activity Manager or E-mail, this information is taken from the activity or e-mail and cannot be edited.

4. If you have accessed this dialog box from the Contact Manager, and you are not using a filter to send this message, use the following guidelines when selecting the recipient of the message:

Note: If you are using a filter to send this message, proceed to the next step.

??Leave the current contact selected if you would like to send the message to that contact. If you are sending the message to the current contact, the **Pager #:** and **Pager ID:** fields will be filled in from the contact's record; this information can be edited if necessary.

??To send the message to a TeleMagic user, select the user from the **Send To:** drop down list. The **Pager #:** and **Pager ID:** fields will be filled in with information from the user's Preference settings; this information cannot be edited.

??Select the **User Group** radio button and select a user group from the drop-down list. When a user group is selected, the message will be sent to every TeleMagic user in the user group with wireless messaging information entered in Preferences. The **Pager #:** and **Pager ID:** fields will appear blank. Information from the Wireless Messaging Preferences of each user in the user group will be filled in as the messages are sent; these fields cannot be edited.

?? To send the message to someone other than a contact or TeleMagic user, select **Manual Entry**. The **Pager #:** and **Pager ID:** fields will be blank; this information must be entered manually

5. Click **Options** to open the Wireless Messaging Options dialog box:



Wireless Messaging Options Dialog Box

The **Notify On:** check boxes will default to your selections in Wireless Messaging Preferences.

6. Mark the **Notify On:** check boxes if appropriate. When marked, the **Completion** checkbox will cause a pop-up message to appear notifying you upon successful completion of the page. If the **Failure** checkbox is marked you will be notified if the page is unsuccessful and be given an error code explaining the reason for the failure.

If a TeleMagic user was selected in the **Send To:** field, the **Packet Size:** and **Baud Rate:** fields will default to the Preference settings of the user to whom the message is being sent and cannot be edited. If the current contact, **Manual Entry**, or a user group was selected, these fields will default to the lowest value.

7. If you are sending the message to the current contact or **Manual Entry** and know the packet size and baud rate supported by the paging carrier used by that person (not your modem's baud rate), enter them in the appropriate fields. If you are sending the page to a user group and know the settings for all users in the group, enter the minimum supported settings in the appropriate fields.

- or** If you do not know the packet size and baud rate supported by the individual's paging carrier, or by the paging carrier for *all* users in a user group, choose the default settings.

WARNING! These default settings represent the minimum settings supported by paging carriers. You will not encounter problems using these settings, even if the individual's paging carrier actually supports higher settings. You will, however, encounter problems if you change these defaults to settings higher than the paging carrier can handle. *Do not* edit these defaults unless you are certain of the settings.

Note: If the message length displayed on the main Wireless Messaging dialog box exceeds this Packet Size, the message will be broken up into multiple packets. Each packet will display the total number of packets for the message and give its page number. For example, if the message is divided into three packets, the first packet will display Page 1 of 3, the second will display Page 2 of 3, etc. The pages may not necessarily be received in order (based on your wireless messaging service provider).

8. The **Number Of Retries:** field controls the number of times a message should be attempted before failing and will default to your Wireless Messaging preference setting. Edit this if necessary.
9. Mark the **Monitor Transmission** checkbox if you want to view the progress of the transmission of your message. This will default to your Wireless Messaging preference setting.

Note: Monitor Transmission is not applicable if you are sending the wireless message to the queue.

10. If you do not want to send the message immediately, and you are using a queue, enter the date and time you want the message sent in the **Delay Until** date and time fields.
11. To send the message to recipients in a filter, mark the **Use Filter** checkbox and select the filter from the drop-down list.
12. Click **OK** to save your edits and return to the main Wireless Messaging dialog box.
13. Use the **Queue:** drop down list to select where the wireless message is processed. If you select **Send Immediately (Local)** the message will be sent from your workstation. (This option is only available if you are set up to send wireless messages in Wireless Messaging preferences.) If you select a queue, the Automation Server will process the message.

14. When satisfied with your selections, click **P**age. The message will be sent.

Note: If you have chosen to send your wireless message locally and you close TeleMagic before the wireless message has been sent, the wireless message will be stored in a file and not sent. When TeleMagic is opened the next time, the wireless message will be sent immediately.

- or** To discard your changes, click **C**ancel. (If you are sending a message from the Activity Manager or E-mail, **C**ancel will only cancel the wireless message, not the activity or e-mail.)

Aborting a Wireless Message

If the wireless message has been queued to the Automation Server, it can be aborted using the server's maintenance features. If you have sent a wireless message locally, you can abort it from your local workstation.

To Abort a Local Wireless Message Transmission:

1. Access the TM Pager-Dialing Terminal message box using the following guidelines:
 - ?? If you marked the **M**onitor Transmission checkbox in either Wireless Messaging preferences or in the Wireless Messaging Options dialog box, the TM ENT Pager Dialing Terminal message box will appear after you sent your message and inform you of the transmission's progress.
 - ?? If you did not mark the **M**onitor Transmission checkbox, you must access the TM ENT Pager - Dialing Terminal pop-up.

Press ALT+TAB once and a pop-up will appear showing icons representing all of the currently running programs. Continue pressing ALT+TAB until you have highlighted the pager icon, then release the ALT+TAB keys and the TM ENT Pager - Dialing Terminal message box will appear. If not, repeat this procedure.

The **Sending to:** field in the TM ENT Pager-Dialing Terminal message box will show to whom the transmission is being sent. (If the transmission is going to a group, the individual user names will not be shown.) The **Pager Number:** will show the carrier terminal numbers for each transmission.
2. Click **A**abort.

A pop-up will appear asking you to confirm this choice.
3. Click **Y**es to stop the transmission. If the transmission is to an individual user or contact, the transmission will stop.
4. If the transmission is to more than one user, that transmission will stop and the next transmission will begin. Repeat steps 2 and 3 as needed for each user in the group.

SALES FORECASTING

Forecasting Sales

In the direct sales environment there is a constant need for accurate, up-to-date sales data. Past sales need to be recorded and future sales should be forecast in order for a company to stay healthy.

TeleMagic's Sales Forecasting feature allows you to keep track of projected and actual sales, and relate those sales to contact records in any TeleMagic database. It also includes several easy-to-use pre-formatted reports, which you can use to predict sales trends, analyze sales forecasting accuracy, and evaluate the overall performance of your salespeople.

Adding Sales Forecasts


To record sales forecasts with TeleMagic, you will need to:

- ?? Estimate a prospective sale amount;
- ?? Track the progress of the sales cycle;
- ?? Record the final figures of the actual sale.

You will probably enter the estimates some time before the final sale has taken place. This chapter includes steps to take you through the process of recording an estimate, and describes how you would enter information about the final sale.

General Sales Forecasting Information

To Add a Sales Forecast:

1. From the **Office** menu, select **Sales Forecasting**.
- or** Click on the Sales Forecasting button, if configured .

Note: You must have a contact database open to use **Sales Forecasting**. If you do not have an open database, the **Sales Forecasting** option will not be available.

Note: You must have security rights to be able to add Sales Forecasts.

The Sales Forecasting dialog box will open:

Blank Sales Forecasting Dialog Box

A blank dialog box will only appear if no sales forecasts have been added to the system. If you have already added forecasts, one of two things will happen:

??The first sales forecast that was ever added to the system will be displayed.

??If you have accessed the Sales Forecasting dialog box from a contact record, and there are sales forecasts linked to that record, the first linked forecast for the contact will be displayed.

2. Click **Add**.
3. Type a description of the sale you are forecasting in the **Description:** field.
Your description does not need to be unique, but it should contain information that will readily identify the sale at hand.
4. Click in the **Rep:** field to enter a sales representative's name.

The Select Sales Representative dialog box will open:



Select Sales Representative Dialog Box

The name of the current user entering the forecast information will be highlighted.

5. Click **OK** if this user is correct.

or Highlight another sales representative, and click **OK**.


You will return to the Sales Forecasting dialog box.


6. Enter a product type or name in the **Product:** field.

The **Product:** name field is completely user-definable. You can add a list box to this field in order to standardize product names for clarity and consistency.

7. Enter a sale type in the **Type:** field.

The **Type:** field can contain any information necessary to further categorize the sale.

 **Hint:** You can add a list box to this field to standardize the sales types for clarity and consistency.

8. Enter the projected quantity (if desired) in the **Qty:** field.
9. Enter the sales status in the **Status:** field. The **Status:** field is completely user-definable. You can add a list box to this field to standardize the sales status for clarity and reporting. This field should be updated as the sale progresses.
10. In the **Quotation:** field, enter the amount of the sale, as quoted in the estimate to the customer.
11. In the **Budget Amount:** field, enter the total resources the customer has allocated to the purchase, if that information is available.
12. Enter a **Projected Sale Date:**, or click the date picker icon  and choose a date from the Go To Date dialog box. This data must be entered for a sales forecast to be included in any of the Sales Forecasting reports.
13. In the **Probability of Closure:** field, enter the best estimate, expressed as a percentage, of the likelihood that the deal will close successfully.

Example: You are dealing with a customer who is dependable, and has consistently ordered similar amounts of your product in the past. You consider the sale probable, and enter 95% in this field.

14. Type any notes you want to add to the forecast in the notepad. Use the **Notepad Stamp** button to enter the date, time, and User ID into the Sales Forecasting notepad. If the sales forecast is linked to a contact, you can use the **Paste Contact Info** button to enter the contact's information in the notepad.
 15. Click **Save** to save your changes and exit Sales Forecasting.
- or** Proceed to the other pages to further refine your Sales Forecasting information.

Linking Sales Forecasts to Contact Records

To link the forecast to a contact, use one of the following options:

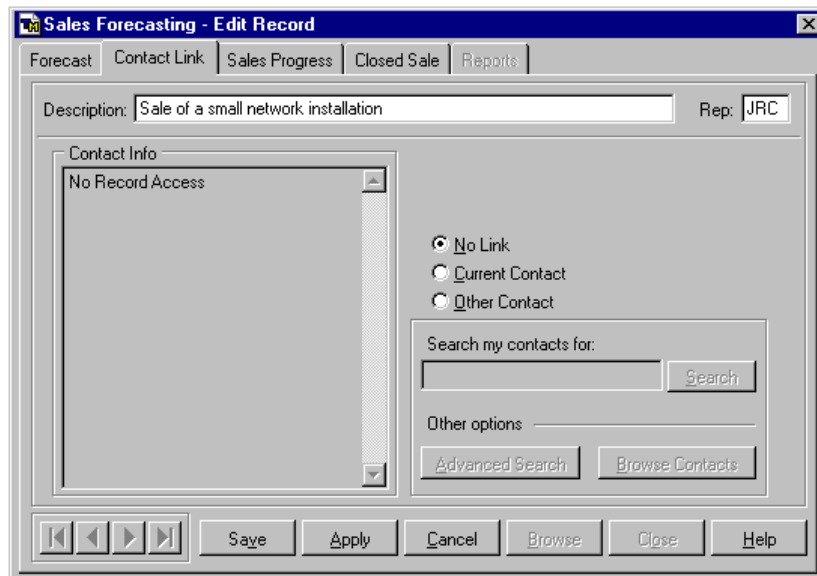
- ?? You can link the Sales Forecast to the current contact.
- ?? You can link the Sales Forecast to a contact record on the current level using the Search function.
- ?? You can link the Sales Forecast to a contact record on the current level using the Browse Contacts function.
- ?? You can link the Sales Forecast to a contact record on another level or in another database using the Advanced Search function.
- ?? You can link the Sales Forecast to a contact record on another level or in another database using the Browse function.

Each of these options has a separate procedure. To use either of the options using Search, you will need to know some information about the record to which you want to link the Sales Forecast, which field contains that information, and which database and level contains the record. You will also need one or more indexes set up for Multiple Index Search.

To Link a Sales Forecast to the Current Record:

1. In the Contact Manager, open the record to which you want to link the Sales Forecast. Open the Sales Forecast that you want to link to the open record, or create a new Sales Forecast.
2. Click on the **Contact Link** tab.

The Contact Link page will open:



Sales Forecasting; Contact Link Page

3. Click **Edit**.

The dialog box will change to Edit mode. This will affect all pages in the dialog box.

4. Click the **Current Contact** radio button.

The contact information will appear in the Contact Info section. Identifying information about the linked record will also appear in the title bar after the sales forecast has been saved. The Sales Forecast will be linked to the current record.

5. Click **Save** to save all changes.

or Click **Cancel** to abandon changes and return to View mode.

or Continue to other pages and continue to refine the Sales Forecast. Changes will be retained unless **Cancel** is clicked. All unsaved changes will be abandoned, regardless of what page is open, when the **Cancel** button is clicked.

To Link a Sales Forecast to a Record on the current level using Search:

1. In the Contact Manager, open the level containing the record to which you want to link the Sales Forecast. Open the Sales Forecast that you want to link to a record, or create a new Sales Forecast.

2. Click on the **Contact Link** tab.

The Contact Link page will open.

3. Click **Edit**.

The dialog box will change to Edit mode. This will affect all pages in the dialog box.

4. Click the **Other Contact** radio button.

The **Search my contacts for:** field will become available.

5. Enter the word to be searched for in the **Search my contacts for:** field.

Note: You do not have to search for a whole word. If you do not know the entire word, name, or number to be searched for, enter as much as you know. If you make a partial entry, it must be the first characters of the word to be searched for. The search word must be stored in a field that is the first field of an index expression. The index must be set up for Multiple Index Search.

6. Click **Search**.

The Sales Forecast will be linked to the first record matching the word entered in step 5. If no match is found, you will be given the option of browsing for the record. (Click **Yes** to open a Browse window. See the following procedure for instructions.)

If the record selected is not the record that you want to link the Sales Forecast to, return to step 5 and search for a different word, or use one of the other linking procedures.

7. Click **Save** to save all changes.

or Click **Cancel** to abandon changes and return to View mode.

or Continue to other pages and continue to refine the Sales Forecast. Changes will be retained unless **Cancel** is clicked. All unsaved changes will be abandoned, regardless of what page is open, when the **Cancel** button is clicked.

To Link a Sales Forecast to a Record on the Current Level using Browse:

1. In the Contact Manager, open the level containing the record to which you want to link the Sales Forecast. Open the Sales Forecast that you want to link to a record, or create a new Sales Forecast.

2. Click on the **Contact Link** tab.

The Contact Link page will open.

3. Click **Edit**.

The dialog box will change to Edit mode. This will affect all pages in the dialog box.

4. Click the Other Contact radio button.
The **B**rowse **C**ontacts button will become available.
5. Click **B**rowse **C**ontacts.
A Browse window will open listing all records on the current level.
6. Scroll through the list of records until you have found the desired record. Click on any field of that record.
The field will become highlighted.
7. Click **S**elect.
The Sales Forecast will be linked to the selected record. The Browse window will close. The contact information will appear in the **C**ontact **I**nf section.
8. Click **S**ave to save all changes.
or Click **C**ancel to abandon changes and return to View mode.
or Continue to other pages and continue to refine the Sales Forecast. Changes will be retained unless **C**ancel is clicked. All unsaved changes will be abandoned, regardless of what page is open, when the **C**ancel button is clicked.

To Link a Sales Forecast to a Record on Another Level or Database using Advanced Search:

1. Open the Sales Forecast that you want to link to a record, or create a new Sales Forecast.
2. Click on the **C**ontact **L**ink tab.
The Contact Link page will open.
3. Click **E**dit.
The dialog box will change to Edit mode. This will affect all pages in the dialog box.
4. Click the Other Contact radio button.
The **A**dvanced **S**earch button will become available.
5. Click **A**dvanced **S**earch.
The Advanced Contact Search dialog box will open.
6. Enter the word to search for in the Search For: field.

Note: You do not have to search for a whole word. You can enter the first few characters in this field and the first match will be returned. You can search for words, names, numbers, or any other valid data type.

The **S**earch button will become available.

7. From the **Database**: drop-down list, select the database containing the contact record.
8. From the **Level**: drop-down list, select the level containing the contact record.
9. From the **Index**: drop-down list, select the index to be used to search for the record.

Note: The field containing the search word must be the first field in the expression of the selected index.

10. Click **Search**.

The Sales Forecast will be linked to the first record found which meets the search criteria. The Advanced Contact Search dialog box will close. The contact information will appear in the **Contact Info** section. If the selected record is incorrect, return to step 5 and search again using different criteria, or use a different linking procedure. If no match is found, you will be given the option of browsing for the desired record. (Click **Yes** to open a Browse window. See the following procedure for selecting a record using the Browse feature.)

11. Click **Save** to save all changes.

or Click **Cancel** to abandon changes and return to View mode.

or Continue to other pages and continue to refine the Sales Forecast. Changes will be retained unless **Cancel** is clicked. All unsaved changes will be abandoned, regardless of what page is open, when the **Cancel** button is clicked.

To Link a Sales Forecast to a Record on Another Level or Database using Browse:

1. Open the Sales Forecast that you want to link to a record, or create a new Sales Forecast.

2. Click on the **Contact Link** tab.

The Contact Link page will open.

3. Click **Edit**.

The dialog box will change to Edit mode. This will affect all pages in the dialog box.

4. Click the **Other Contact** radio button.

The **Advanced Search** button will become available.

5. Click **Advanced Search**.

The Advanced Contact Search dialog box will open.

6. From the **Database**: drop-down list, select the database containing the record to which the Sales Forecast is to be linked.

7. From the Level: drop-down list, select the level containing the record to which the Sales Forecast is to be linked.
8. Click **B**rowse.
A browse window will open listing all records on the selected level (from step 7) of the selected database (from step 6).
9. Scroll through the list until you find the desired record.
10. Click on any field of the desired record.
The field will become highlighted.
11. Click **S**elect.
The Sales Forecast will be linked to the selected record. The Browse window will close. The contact information will appear in the **Contact Info** section.
12. Click **S**ave to save all changes.
or Click **C**ancel to abandon changes and return to View mode.
or Continue to other pages and continue to refine the Sales Forecast. Changes will be retained unless **C**ancel is clicked. All unsaved changes will be abandoned, regardless of what page is open, when the **C**ancel button is clicked.

Recording Sales Progress

Once the initial client contact has been made and a sale forecast, a sales person will likely keep in contact with the client up until the time the sale closes. Many sales people have a specific schedule of phone calls, letters, and/or faxes used in following up on sales leads. TeleMagic allows you to track this sales progress, and even allows you to standardize this process by using list boxes.

To View and Update Sales Progress:

1. From the **O**ffice menu, select **S**ales Forecasting.
or Go to the contact record for which you want to view a specific sales forecast and click **O**ffice, **S**ales Forecasting.
2. Locate the sales forecast for which you wish to chart progress and click the **S**ales **P**rogress tab.

The Sales Progress page will open:

Sales Forecasting - Edit Record

Forecast | Contact Link | **Sales Progress** | Closed Sale | Reports

Description: Sale of a small network installation Rep: JRC

Sales Phase	Comments	Date	Flags
Requirements De		01/10/2099	D
Initial Proposa		01/16/2099	T
Proposal Modifi		01/30/2099	E
Final Proposal		02/01/2099	E
Initial Contrac		02/11/2099	Q
Decision Won		06/01/2099	
Order Received		06/14/2099	

06/16/99 12:28p - DAC - They should be able to buy more user capability at end of 3rd qtr!

Notepad Stamp

Paste Contact Info

Save Apply Cancel Browse Close Help

Sales Progress Dialog Box


3. Click **Edit**.

The dialog box will change to Edit mode. This affects all pages of this dialog box.

4. Complete the fields following these guidelines:

??The **Sales Phase** fields allow you to standardize each phase of a sale. For example, you might have numbered follow-up letters, each one representing a different phase; or a specific set of sales steps that would each constitute a phase. It is useful if all users use the same terminology in naming sales phases. To that end, it is recommended you attach a list box to this field. (The list box will be shared by all seven **Sales Phase** fields.).

?? In the **Comments** field, type any comments concerning the specifics of this contact with the client.

??In the **Date** field, enter the date on which the sales phase occurred, or click the Date Picker icon  and choose a date from the pop-up calendar.

??In the **Flag** field, enter a flag code, consisting of up to 5 characters. As with the **Sales Phase** fields, it is recommended you attach a list box to this field for consistency.

5. Edit the Notepad as required.
6. Click **Save**. The Dialog box will return to View mode.

Recording Actual Sales

In an ideal world, every forecasted sale would actually take place as predicted. In the real world, any good sales recording program needs to allow for the differences between a sales forecast and an actual sale. TeleMagic assumes that sometime after you record a sales forecast, you will want to enter the details of the actual final sale into your database.

To Record an Actual Sale:

1. From the **Office** menu, select **Sales Forecasting**.
2. Use the arrow buttons to locate the appropriate sales forecast.
- or Click **Browse**, highlight the appropriate forecast in the browse window, and press ENTER.
3. Click the **Closed Sale** tab.

The Closed Sale page will open:

The screenshot shows the 'Sales Forecasting - Edit Record' dialog box with the 'Closed Sale' tab selected. The 'Description' field contains 'Long term quote' and the 'Rep' field contains 'JRC'. Below this is a section for 'Actual Sale Amounts for Closed Sale' with fields for 'Purchase Order', 'Sale Date' (with a calendar icon), 'Actual Sale Amount' (0.00), and 'Cost of Goods' (0.00). Another section, 'Original Forecast Information', contains 'Date' (09/19/2099), 'Amount' (249.95), and 'Budget Amount' (250.00). At the bottom, there is a text area with a timestamp and notes, and buttons for 'Notepad Stamp' and 'Paste Contact Info'. The bottom of the dialog features navigation arrows and buttons for 'Save', 'Apply', 'Cancel', 'Browse', 'Close', and 'Help'.

4. Click **Edit**.

The dialog box will shift to Edit mode. This affects all pages in the dialog box.

Enter the details of the sale into the **Actual Sales Amounts for Closed Sale** fields.

5. In the **Purchase Order** field, enter the number of the purchase order used by the customer, if applicable.

6. Enter the date the sale was finalized in the **Sale Date:** field. (You must have data in this field if you wish this record to be included in the **Closed Sales** filter and any reports on completed sales.)
- or** Click the Date Picker icon and choose a date from the Go To Date dialog box.
7. Enter the amount of the final sale in the **Actual Sale Amount:** field.
8. Enter the cost of the goods to your company in the **Cost of Goods:** field.
9. Edit the Notepad as required.
10. Click **Save** to save the sale figures.

Creating Sales Forecasting Reports

TeleMagic can produce reports that allow you to analyze the forecasting and sales data that have been collected using the Sales Forecasting feature. These reports allow you to view data in a textual format, a graphic format, or both. They can be valuable tools for individual salespeople, as well as powerful management tools.

In addition to being able to select from a variety of report styles, these reports and charts can be filtered to include only the data you want to view. You are also able to define groupings, and generate statistical summaries on those groups.

There are four Sales Forecasting reports available:

- ?? Forecasted Sales Report
- ?? Closed Sales Report
- ?? Forecast vs. Actual Report
- ?? Sales Progress Report

To Create a Sales Forecasting Report or Graph:

1. Open a database and access the Sales Forecasting dialog box by choosing **Office, Sales Forecasting** from the Main menu.
2. At the Sales Forecasting dialog box, click the **Reports** tab.
The Reports page will open.
3. Open the **Report:** drop-down list. There are four types of reports that are available.

The *Forecasted Sales* report will produce a report of any sales forecasts that are still pending. This will include any records that have a date in the **Projected Sale Date:** field but not in the **Sale Date:** field.

The *Closed Sales* report will produce a report of forecast sales that have closed. This will include records that have a date in the **Sale Date:** field.

The *Forecast vs. Actual* report will produce a report comparing the **Sale Amount:** field to the calculated forecast amount (the quote * the probability of closure). This report will include records that have dates in both the **Sale Date:** and **Projected Sale Date:** fields.

The *Sales Progress* report will produce a report showing all of the entries from the Sales Progress dialog box for any sales forecast that has a date in the **Projected Sale Date:** field. If there are no Sales Progress entries for a sales forecast, a blank line will print.

4. In the **Start Date:** field, enter the earliest date from which the report is to select records, or click the Date Picker icon to bring up a calendar from which you can select a date.
5. In the **End Date:** field, enter the last date from which the report is to select records, or click the Date Picker icon to bring up a calendar from which you can select a date.

If the **Detail** checkbox is marked, the report will contain additional information specific to the record, such as the Rep: and Product:, as well as dollar amounts and dates. This information will vary depending upon the report you are printing.

6. When Detail is marked, you will also be able to select from the following check boxes:
 - ?? If the **Contact Information** checkbox is marked, the report will contain the Company and Contact key fields from the record to which the forecast is linked. This option is only available in the Forecasted and Closed sales reports, and only when reporting on the current database.
 - ?? The **Other Information** checkbox allows you to include miscellaneous information relating to a forecast, such as the contents of the Description field.
 - ?? If the **Sales Progress** checkbox is marked, the report will contain the information from the Sales Progress Chart dialog box.
 - ?? If the **Comments** checkbox is marked, the report will contain any notes entered in the notepad on the Sales Forecasting dialog box.
 - ?? If the **Summary Totals** checkbox is marked, grouping subtotals (based on your grouping selections in step 13, below), totals, and grand totals will be generated.
7. Select **Individual** if you want to report on only one user. If you are a supervisor user and want to report on forecasts other than your own, when the **Individual** radio button is selected, a list box showing all users in the system will be enabled. Select the user on whom you want a report.
 - or** If you are a supervisor user, select the **User Group** radio button if you want to report on all members of a user group. When the **User Group** radio button is selected, a list of user groups is enabled. Select the group from the list on which you want to report.
8. Choose the appropriate **Report on:** filter:
 - If you choose **All Records** (which is the default), you will get all of the forecasts regardless of database and contact link.
 - If you choose **Current Database**, you will get all of the forecasts linked to contact records in the current database.
 - If you choose **Current Contact**, you will only see forecasts linked to the current contact.

9. **Type:** allows you to select a filter based on items in the list box attached to the Type: field on the Sales Forecasting dialog box (if applicable). If you do not have a list box attached to this field, you will be able to report on either **All Types** or **Blank Type** in this field.
10. **Status:** allows you to select a filter based on items in the list box attached to the Status: field on the Sales Forecasting dialog box (if applicable). If you have no list box attached to this field, you will be able to select between **All Status** or **Blank Status** in this field.
11. **Product:** allows you to select a filter based on items in the list box attached to the Product: field on the Sales Forecasting dialog box (if applicable). If you have no list box attached to this field, you will be able to select between **All Products**, or **Blank Product** in this field.
12. Select the order in which you want the report to be printed from the Index: list. Records in the report will print in the order of the data in the selected field.

You can further sort your report using the **Groupings** option. Groupings will allow you to group by the Projected Sale Month, Product, Sales Rep, Status, Type, or Projected Sale Year and produce summary totals on each grouping. For example, if you are ordering by Product, and you create a grouping by Sales Rep, the records for each Sales Rep will be in order by product. You can then create a further grouping by month to see the Sales Reps groups in chronological order divided by month, with multiple forecasts in each month arranged by product. You can select up to three sub-groups.

13. If you want to use Groupings, mark the **Use Grouping** checkbox.

The **Groups** button will become active.


14. Click **Groups**.

The Report Groupings dialog box will open.

On the left side of the Report Groupings dialog box is the list of Available Groupings. (You are allowed to choose up to three for each report.)

15. Highlight the grouping you would like to use from the Available Groupings list and click **Add**. The item will move into the Selected Groupings box to the right. To remove any choice from Selected Groupings, highlight it and click **Remove**. Your selection will move back to Available Groupings.





The order of the groupings in the Selected Groupings box is very important in how the report is arranged, and in how it calculates subtotals and totals. For example, if you were grouping by Sales Rep first, and then grouping the sales reps by Month, Sales Rep must be first in the Selected Groupings box. After you have selected all of the groupings to be used, you can rearrange the order in which they will appear (and, therefore, the order of the data's grouping, subtotaling, and totaling). You can select a maximum of three groupings.

16. To change the order of Selected Groupings, click the button to the left of each grouping, drag it to its new position, and drop it.
17. When satisfied with your grouping selections, click **OK**. The groupings will display in the Groupings field.
18. If you want to generate a textual standard report, select the **Report** radio button and proceed to step 20.
- or** If you have groupings established and want to see your report in the form of a graphic chart, select the **Graph** radio button.
- or** If you have groupings established and want to see a textual report that includes a graph, select the **Report with Graph** radio button.
19. If either the **Graph** or **Report with Graph** radio button is marked, the Graph Style: list will activate. Choose the style of graphic chart that you want.
20. Click **View** to see a preview of the report and/or graph selected.
21. When you have finished previewing the report, click the Close Preview button .
22. If satisfied with the preview, click **Print** to print the report.
- or** Make any changes and repeat steps 20 through 22.
23. Click **Close** to close the Sales Forecast dialog box.

Working With Sales Forecasts

Once you have created your sales forecasts you can easily navigate through them using the “VCR” style buttons located at the bottom of the dialog box.

To View Individual Sales Forecasts:

1. From the **Office** menu, select **Sales Forecasting**.
If the current record in the database has a forecast linked to it, that forecast will be displayed; otherwise, the first forecast that was added will be displayed.
2. Click the  button to move forward through forecasts.
Click the  button to move to the last forecast in the filter.
Click the  button to move back through forecasts.
Click the  button to move to the first forecast in the filter.

Changing the Index and Filter of Sales Forecast Records

The order in which records are displayed is controlled by the current index, as displayed in the **Index:** field in the lower section of the Sales Forecast dialog box, Forecast page. You can order your sales forecast records from practically any field in the Sales Forecast dialog box. There are also a number of pre-defined filters available for only viewing a particular sub-set of records.

To Change the Order in Which Forecasts are Displayed:

1. From the **Office** menu, select **Sales Forecasting**.

The default index, **None**, will be displayed in the **Index:** list box. This default index will present forecasts in the order in which they were originally added.

Note: Do not confuse the sales forecasting internal indexes with regular TeleMagic database indexes. Although they function in the same manner, they are not linked in any way. The index currently in use in your database has no effect on the order in which forecasts are displayed, and vice versa. Also, you cannot add any new forecasting indexes, as you can in a contact database.

2. Click the **Index:** list arrow .

A list of available indexes will appear.

There is an index for almost every field that appears in the Sales Forecasting dialog box.

3. Choose a new index.

Example: If you want to see forecasts in alphabetical order by description, choose **Description**. If you want to see forecasts in ascending order by amount of forecasted quotation, choose **Forecasted Quote**.

The new index will be active, and will be evident if you click one of the arrow buttons to navigate forward or backward through the records, or go into Browse mode.

To Filter the Sales Forecasting Records:

1. From the **Office** menu, select **Sales Forecasting**.

2. Click the **Filters** list arrow .

The Sales Forecasting Filters drop-down list will open.

3. Click on the filter you need to use:

??Choose **All Records** if you do not wish to filter by sales status.

??Choose **Pending Sales Only** to view only forecasts with projected sales dates and a status of Pending.

??Choose **Closed Sales** to view forecasts *with* information on the Closed Sale page.

??Select **All Records for Current Database** to view only forecasts linked to contacts in the current database.

? Select **All Records for Current Contact** to view only forecasts linked to the current contact.

??Select **Pending Sales for Current Database** to view only forecasts in the current database with a status of Pending.

??Select **Closed Sales for Current Database** to view only forecasts in the current database with a status of Closed.

??Select **Pending Sales for Current Contact** to view only forecasts linked to the current contact with a status of Pending.

??Select **Closed Sales for Current Contact** to view only forecasts linked to the current contact with a status of Closed.

Sales Forecast Browse View

Only one forecast is displayed at a time in the Sales Forecasting dialog box. If you wish to view multiple forecasts at one time, you can use the Browse feature.

To Access Sales Forecasting Browse View:

1. From the **Office** menu, select **Sales Forecasting**.
2. If there is a particular order in which you want to view records, or a particular group of records you want to view, change the index and/or filter.
3. Click **Browse**.

The Browse Sales Forecasts window will open:

Description	Type	Product	Quantity	Status	FC Sale D	FC
CTS 9000	Customer	Model 900	1.00	Prospect	02/19/20	0
1000 liter barium	Customer	Barium Lix	1.00	Customer	02/20/20	0
Scanning Element	Retailer	ETR 412t	25.00	Customer	02/16/20	0
Motor	Wholesaler	Model 18	100.00	Hot Prospect	02/27/20	0

Edit

Close

Sales Forecasting Browse Window

??Use the scroll arrows to browse up and down or across this listing.

??To go to the details of a specific forecast, highlight that forecast and click **Edit**, or double-click.

4. To exit the browse window, press ESC or click **Close**.

The forecast that was highlighted in the browse window will be displayed.

Accessing Linked Contact Information

When viewing sales forecast information, you may need to view information on the contact to which the forecast is linked. You can view contact information directly from the sales forecast screen.

To View Linked Contact Information:

- ➡ On the linked sales forecast record, click the **Contact Link** tab.

The Contact Link page will open.

- or** From the Forecast page, click **Properties**. The name of the linked record is included in the Sales Forecasting Properties message box.

NOTES AND MESSAGES

Notes and Messages

TeleMagic offers several means of quickly communicating with other users and of reminding yourself of ideas, considerations, and events without the use of the Contact Notepad, E-mail, Wireless Messaging, or Word Processing. These features are:

- ?? The Notebook
- ?? The Bulletin Board
- ?? The Message Taker
- ?? Tack-Its


The Notebook

The Notebook is like a personal reference book. You can use it to store text not associated to any particular contact. For example, Area Code lists, company goals, ideas on a specific topic, and telephone scripts can all be stored in Notebook records.

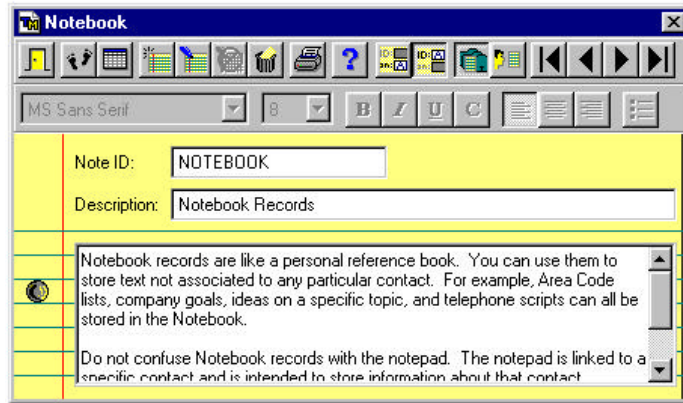
Viewing Notebook Records

To View a Notebook Record:

☞ From the **Office** menu, select **Notebook**.


or Click the Notebook button on the System Toolbar (if configured) 


The Notebook will open:




The Notebook

Here you can store notes related to a particular database that anyone opening the database can view (such as goals, current stock information, or the status of projects related to the database), or your own notes that only you can view (such as personal

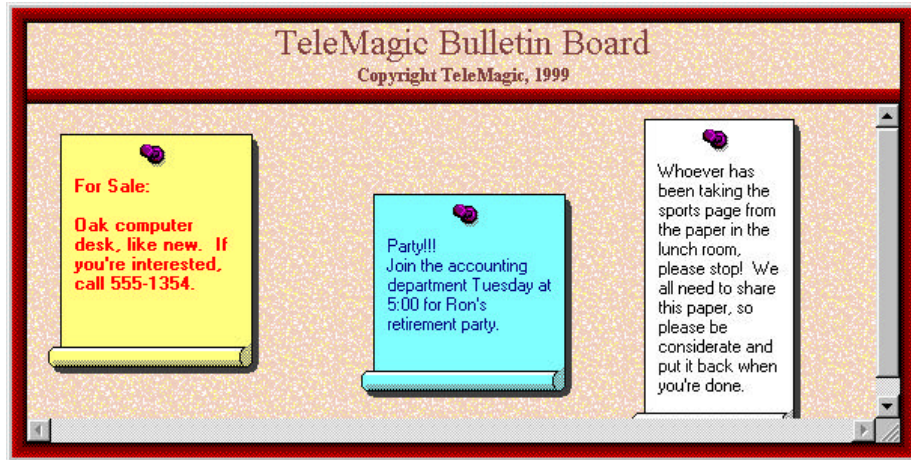
reminders and lists). Click either the Sort Notes by Description button  or the

Sort Notes by ID button  to determine how the records will be sorted. Page through the Notebook using the VCR buttons. You also have the option of viewing The Notebook in Browse view.

Use the Notebook Toolbar to manage your Notebook. From this toolbar you will be able to open the Goto Notebook Record dialog box and find any record based on either ID or Description, enter Browse mode, add a new note, edit an existing note, cancel current changes, delete a note, or print a note. To close the Notebook, click on the Exit Notebook button .

The Bulletin Board

The Bulletin Board provides a convenient forum for all members of your organization to exchange ideas and information. It is a handy place to post general announcements, solicit support for a project, encourage participation in an upcoming event, or any other sort of message that would ordinarily be made on a bulletin board.



TeleMagic Bulletin Board
Your company name will appear at the top

To Add a Message to the Bulletin Board:

1. Open the Bulletin Board by selecting **Bulletin Board** from the **Office** menu.
2. Right-click on the Bulletin Board near where you would like the upper left-hand corner of the message to appear. (You will be able to move the note later, as required.)

The Bulletin Board menu will open.

3. Select **Add Note**.

A blank note will appear on the Bulletin Board, approximately where you were pointing when you right-clicked.

4. Enter the text of the note.
5. Right-click on the note.

The Note menu will open.

6. Change any properties by right-clicking on the note and selecting from the available options. You can change the color of the note, the color of the text, and the font. You can also delete the note and view its properties from this menu.
7. When satisfied with the note, select **Save** from the Note menu.
8. Resize the message by 'grabbing' the right or lower edge and dragging it to the desired size. Reposition the message by grabbing its top edge and dragging to the desired position.
9. Close the Bulletin Board by right-clicking on it and selecting **Close**.

Tack-Its

Tack-Its are small notes used as reminders or to make brief comments on particular records as well as general topics. If you have already used the Bulletin Board, you are already familiar with most features of Tack-Its. Tack-Its can be personal or not personal. They can be linked to a contact, a database, or not be linked. If a Tack-It is personal, it will only be visible to its author. If a Tack-It is not personal, it can be seen by anyone. There is no specific limit to how many Tack-Its you can have at one time.

To Create a New Tack-It:

1. From the **Office** menu, select **Add Tack-It**.

or Click the Add Tack-It button. 

A new Tack-It will open.

2. Enter the desired memo on the Tack-It.

Note: If there is no cursor on the Tack-It, click anywhere on the Tack-It to make it the current window.

3. Right-click on the Tack-It to open the Tack-It menu. Select **Save** to save the note.
- or** Click anywhere off the note. You will be prompted whether to save the note or not. Click on **Yes** to save the note.

To Change the Properties of a Tack-It:

1. Right-click on the Tack-It.
- The Tack-It menu will open.

2. Select from the following options:

Note: Most of these options are only available to the Tack-It's original author.

??**Personal** will be checked by default. If this item is checked, the Tack-It will only be visible to its author. Clicking on this item will toggle the check.

??Click on **Link** to link the Tack-It. A Tack-It can be linked to a contact, a database, or not be linked at all. If a Tack-It is not personal, it must be linked.

??Select **Font** to open the Font dialog box. This allows you to determine the font for the Tack-It. All text on the Tack-It must be the same font. Different Tack-Its can have different fonts from one another.

??Select **Text Color** to open the Color dialog box and set the color for the font on the Tack-It. All text on any particular Tack-It will be the same color.

??Select **Note Color** to select the background color for the note. Choose **Custom** for more color choices.

??**Delete** removes the Tack-It.

??**Properties** opens a message box with general information about the Tack-It.

3. Select **Save** to save changes to the Tack-It.
4. Resize the message by 'grabbing' the right or lower edge and dragging it to the desired size. Reposition the message by grabbing its top edge and dragging to the desired position.

The Message Taker

The Message Taker provides a convenient format for sending brief messages to TeleMagic users regarding messages from third parties, such as visitors and phone calls, that came in while the user was away. The Message Taker is similar to 'While You Were Out...' message pads.

To Send a Message to a User with Message Taker:


1. From the **Office** menu, select **Message Taker**.

The Message Taker will open:



The screenshot shows a window titled "New message - TeleMagic Message Taker". Inside, the title bar says "TeleMagic Message Taker". The form has several fields: "For" (a dropdown menu showing "Jennifer Cram"), "Date" (a calendar icon and "02/13/2001"), "Time" (a clock icon and "01:18p"), "From" (a text box), "Company" (a text box), "Phone" (a text box), "Ext." (a text box), and "Regarding Message" (a large text area). To the right of these fields is a blue panel with several checkboxes: "Urgent", "Phoned", "Was In", "Returned Your Call", "Will Call Back", "Wants To See You", and "Please Call Back". At the bottom left are checkboxes for "Notify" and "Password protect". At the bottom center is a "Link to Contact..." button. At the bottom right are "Send" and "Cancel" buttons. A status bar at the very bottom says "There are 0 messages" and has a "Close" button.

The Message Taker in Edit Mode

2. If you are not in edit mode, click on the **Create new message** button.  If you have no incoming messages waiting, you will be in edit mode by default.

Note: If the **Create new message** button is not present, click **Cancel** to leave New Message mode.

3. If you want to link the message to a contact, click **Link to Contact**. This will open the Contact Link dialog box which will allow you to link the message to the current contact, or search for a contact in any accessible database. When you link a message to a contact, the **From**, **Company**, and **Phone** fields will be filled in with information

from the contact record unless these fields are already filled in. You can change any of this information, if necessary.




4. Select whom the message is for from the **For** drop-down list.
5. The **Time**, and **Date** fields can be edited, if necessary.
6. Identify the source of the message in the **From** field. Enter company and telephone information in the **Company**, **Phone**, and **Ext.** fields.
7. Enter the subject of the message in the **Regarding** field.
8. Enter the details of the message in the **Message** field.
9. Select any combination of the following:

<u>N</u> otify	The originator of the message will be informed when the message is received.
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<u>P</u> assword Protect	The user will be prompted for their TeleMagic password before the message will be displayed. If the user does not have a password, they should leave the Password field on the prompt blank.
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10. Further categorize the message by marking the check boxes to the right. Mark as many as are appropriate.
11. Click **Send** to send the message.

To Read your Message Taker Messages:

1. From the **Office** menu, select **Message Taker**.
The Message Taker will open. The number of messages for you will be indicated in the status bar at the bottom of the Message Taker.
2. Scroll through your messages using the **Go to Previous** and **Go to Next Message** buttons  .
3. Delete messages by clicking on the **Remove current message** button .

INDEX

Index

A

Abort

- Wireless Message, 157

Accessing Linked Contact Information, 178

Activities

- Linking to the Current Record, 54

Activities

- Adding Comments, 57

- Assigning Resources to Activities, 59

- Assigning to Another User, 58

- Availability of Users and Resources, 59

- Direction In/Out, 53

- Go To Date, 69

- Icons, 68

- Linking Records, 54

- Linking to Records on Different Levels or

 - Databases, 56, 57

- Linking to Records on the Current Level, 55

- Month View, 65

- Recurring Activities, 60

- Scheduling, 52

- Select Time, 70

- Setting an Alarm, 54

- To-Do View, 67

- User Permissions, 15

- Viewing Full Details, 72

- Week View, 63

Activity Browse, 71

Activity Details

- Viewing, 72

Activity Field, 33

Activity Manager

- Browse Window, 71

- Day View, 42

- Fax, 143

- Going to any Date, 69

- Icons, 68

- Reviewing, 61, 67

- Starting, 42

Activity Manager Tools, 43

Adding Controls to Toolbars, 22

Address Books, 86

Addressing Messages, 86

Answering E-mail, 90

Answering Phones, 110

Attaching Files, 91

Attaching Merge Documents, 92

Attachments, 91

B

Branch Scripting, 114

- Reset, 116

- Setup, 116

Browse

- Activity Manager Browse, 71

- Sales Forecasting, 177

Browse View, 30

- Exit, 30

Browse Window

- Activity Manager, 71

Bulletin Board, 182

- Adding Messages, 182

Buttons

- To Specific Date, 69

C

Calendar

- Going to any Date, 69

- Month View, 65

- Reviewing, 61, 67

- To-Do View, 67

- Using, 61, 67

- Week View, 63

Call Notes

- Recording, 104, 110

Cancel vs. Close/Save, 8

Century Rollover, 32

Changing Pages

- Control Bar, 25

- Keyboard, 26

Changing Views, 25

- Character Field, 31
- Checkbox Fields, 32
- Checking for New Messages, 89
- Close vs. Save**, 8
- Composing Messages, 84
- Contact Data
 - Saving, 35
- Contact Database
 - Selecting, 20
 - Viewing Records, 28
- Contact Manager
 - Contact Manager Toolbar, 22
- Contact Manager
 - Closing, 40
 - Goto, 36
 - Layout, 22
 - Opening, 22
 - Using Wireless Messaging, 153
- Contact Manager Toolbar
 - Adding Controls, 22
 - Changing Levels, 25
 - Moving and Resizing, 24
 - Removing Controls, 24
- Contact Manager Toolbars
 - Using the Contact Manager Toolbars, 13
- Contact Records
 - Adding, 30
 - Viewing, 26
- Control Bar
 - Changing Pages, 25
- Conventions
 - Instructions, 8
 - Keyboard, 7
 - Mouse, 7
 - Text, 7
- Cover Comments
 - Faxing, 143
- Custom Merge Fields, 128

D

- Data
 - Editing, 31
 - Entering, 31
- Database
 - Changing, 20

- Databases
 - Selecting, 20
- Date Field, 31
- Dates
 - Two-Digit, 32
- Day View, 61
- Day View, 42
- Deleted Messages, 82
- Deleting
 - To-Do's, 73
- Detail View, 67
- Display Preferences
 - Scheduling Activities, 53
- Dockable Toolbars, 24
- Document Templates
 - Creating, 122
- Documentation Database Contact View, 21
- Documents
 - Creating, 122
 - Faxing, 148

E

- Editing Data, 31
- Editing Text, 34
- E-mail
 - Answering, 90
 - Forwarding, 90
 - Taglines, 96
 - Unmarking, 96
- E-mail, 76
 - Addressing, 86
 - Attaching Files, 91
 - Attachments, 91
 - Existing Messages, 82
 - Features, 91
 - Linking to Contacts, 92, 94
 - Linking to Contacts in Other Databases, 93
 - Linking to Contacts when TeleMagic is
 - Closed, 93
 - Marking, 96
 - Opening E-mail, 89
 - Organizing, 83
 - Receiving Messages, 89
 - Sending Messages, 84
 - Spell Checking, 86

Writing Messages, 84

E-Mail

Microsoft Outlook, 76

Setup, Microsoft Outlook, 79

E-mail Account, 80

E-mail Attaching Merge Documents, 92

Entering Data, 31

Entering Text, 34

Exiting TeleMagic, 18

F

Fax Options, 144

Faxing

Activity, 143

Cover Comments, 143

Do Not Merge Docs Option, 147

Documents, 148

Email Notification, 145

Notepad Stamp, 143

Options, 144

Sending A Fax, 140

Sending Documents Created in Supported

Word Processors, 148

Stamp Comments, 146

Stamp Documents, 145

Status Monitor, 143

Using Filters, 146

Features. *See* Telemagic Program Features.

Fields

Activity, 33

Character, 31

Date, 31

Last Call

Updated, 108

Last Revision, 33

LCL, 33

Memo, 32

Moving Between, 35

Notepad

Updated, 109

Number, 32

OLE, 32

Phone, 32

RCL, 33

Rollup Lists, 33

Start, 33

Types, 31

Unique Number, 32

Validated, 34

Files

Faxing, 146, 148, 146

Filtering Records, 27

Filters

Sales Forecasting, 175

Selecting, 27

Finding Notes, 36

Finding Records, 36, 38, 40

Form Letters

Creating, 122

Quick Letters, 133

Windows Write/WordPad, 130

Word 97, 131

WordPerfect 7.0, 132

WordPro 97, 132

Printing, 122, 131, 132, 127, 130

Forwarding E-mail, 90

I

Icon

TeleMagic for Windows, 10

Icons

Activity, 68

in Activity Manager, 68

Phone, 104

Illustration Standards, 8

In/Out Radio Buttons, 45, 53

Inbox, 82

Indexes

Sales Forecasting, 176

Selecting, 27

Informal Communication, 180

Informal Messages

Bulletin Board, 182

Message Taker, 185

Tack-Its, 183

Instruction Conventions, 8

Internet Account Wizard

Opening, 80

Using, 80

Internet Mail, 76

- Controls, 78
- Establishing a New E-mail Account, 80
- Main Screen, 77
- Setup, 78
- Starting, 76
- Toolbar, 78
- User Mailbox, 78
- Keyboard Conventions, 7

L

- Last Revision Field, 33
- LCL Fields, 33
- Letters
 - Creating Form Letters, 122
 - Windows Write/WordPad, 130
 - Word 97, 131
 - WordPerfect 7.0 or 8.0, 132
 - WordPro 97, 132
 - Quick Letters, 133
- Linked Information
 - Accessing, 178
- Linking Documents to Contact Records, 127, 128
- Linking E-mail to Contacts, 94
- Login
 - Changing Your Password, 15
 - First Time Users, 10
 - Password, 10
 - Starting TeleMagic, 9
 - User ID, 10

M

- Mail Merge, 134
- Manual
 - Symbols, 9
- Marking E-mail, 96
- Memo Field, 32
- Merge
 - Creating Documents, 122
- Merge
 - Creating Templates, 122
- Merge Documents
 - Attaching to E-mail, 92
- Merge Fields
 - Custom, 128
- Merging E-Mail

- in Microsoft Outlook, 100
- Message Taker, 185
 - Reading and Deleting Messages, 186
 - Sending Messages, 185
- Messages, 82, 180
- Microsoft Outlook
 - merging e-mail, 100
 - selecting contacts, 98
 - selecting recipients from filter, 98
 - TeleMagic Menu, 97
 - using TeleMagic with, 97
- Month View, 65
- Mouse Conventions, 7
- Notepad
 - Updated after Calls, 109
- Notepad-Only Records
 - Viewing, 180
- Notepad-Only Records Screen, 181
- Notes, 180
 - Adding during Call 106, 110
- Number Field, 32
- OLE Fields, 32
- On Hold Messages, 82
- Open View Layout Tools, 43
- Options
 - Save Settings on Exit, 18
- Organizing Messages, 83
- Outbox, 82

P

- Password, 15
- Phone
 - Answering, 110
- Phone Calls
 - Call Notes, 104
 - Call Notes, 110
- Phone Field, 32
- Preferences
 - Change, 17
 - Customizing, 16
 - Set, 17
 - Setting, 16
- Printing
 - Form Letters, 122
 - Windows Write/WordPad, 130

Word 97, 131
WordPerfect 7.0 or 8.0, 132
WordPro 97, 132
Quick Letters, 133
TM Merge Documents, 134

Program Features. *See* Telemagic Program
Features. *See* Telemagic Program Features

Q

Quick Letter, 133

R

RCL Fields, 33
Reading E-mail, 89
Receiving E-mail, 89
Recording Sales Progress, 168
Records

- Adding Contact, 30
- Filtering, 27
- Notepad-Only
- Viewing, 180
- Saving Changes, 35
- Scrolling, 28
- Selecting, 27
- Viewing
- Current Parent Only, 28
- Viewing, 28

Removing Controls from Toolbars, 24

Responding to E-mail, 90

Rollup Lists, 33

S

Sales Forecasting, 160

- Accessing Linked Contact Information, 178
- Adding Forecasts, 160
- Adding New Forecasts, 160
- Browse, 177
- Filtering, 176
- Linking Sales Forecasts the Current Record, 163
- Linking Sales Forecasts to a Contact Record on Another Level or Database using Advanced Search, 166

- Linking Sales Forecasts to a Contact Record on Another Level or Database using Browse, 167

- Linking Sales Forecasts to a Contact Record on the Current Level using Browse, 165

- Linking Sales Forecasts to a Contact Record on the Current Level using Search, 164

- Linking Sales Forecasts to Contact Records, 163

- Recording Sales, 170

- Sales Forecasting Reports, 172

- Sales Progress, 168

- Sorting, 176

- Updating, 168

- Viewing Forecasts, 175

Sales Progress, 168

Save vs. Close, 8

Schedule

- Day View, 61

- Detail View, 67

- Month View, 65

- To-Do View, 67

- Week View, 63

Scheduling

- Activities, 44

Scripts

- Answering Calls, 118

- Defined, 114

- Making Calls, 116

- Navigating, 115

- Using, 114

Scrolling

- Records, 28

Search

- Specific Records, 37

Searching

- Finding Records, 36

Searching Records, 40

Security, 15

- Controlling Access, 15

- Setting a Password, 15

Select Dialog Box, 70

Sending a Fax, 140

Sending E-mail, 84

Sent, 82

Settings
 Saving, 18
 Starting TeleMagic, 9
 Symbols, 9
 System Toolbar
 Using the System Toolbar, 12

T

Tack-Its, 183
 Changing Tack-Its, 183
 Creating Tack-Its, 183
 Taglines, 96
 TeleMagic
 Basics, 9
 Logging In, 9
 TeleMagic Program Features, 2
 Activity Management, 2
 Contact Management, 2
 E-mail, 4
 Faxing, 5
 Other Communications Features, 5
 Power Features, 5, 6
 Report Generation, 3
 Wireless Messaging, 5
 Word Processing, 4
 Templates
 Creating Form Letters, 122
 Text
 Editing, 34
 Entering, 34
 Text Conventions, 7
 TM-Merge, 134
 To-Do Dialog Box, 45
 To-Do View, 67
 To-Do's
 Adding, 44
 Assigning, 51
 Completed, 73
 Deleting, 73
 Direction In/Out, 45
 Reprioritizing, 73
 Viewing Full Details, 72
 To-Do's
 Adding Comments, 49
 Assigning to Another User, 50

Completing, 51
 Due Date and Overdue, 51
 Linking to a Contact Record, 46
 Linking to Records on Different Levels or
 Databases, 48
 Linking to Records on the Current Level, 47
 Linking to the Current Record, 46
 Wireless Messages, 51

Toolbar
 Customizing, 14
 Toolbars, 12

U

Undeliverable Messages, 82
 Unique Number Fields, 32
 Unmarking E-mail, 96
 User Mailbox, 78
 User Permissions, 15
 Using Wireless Messaging, 152

V

Validated Fields, 34
 Viewing
 Multiple Records, 29
 Viewing Contact Records, 26
 Viewing Records, 28
 Views
 Scrolling Records, 28

W

Week View
 Opening, 63
 Wireless Messages
 Cancel, 157
 Wireless Messaging, 152
 Aborting, 157
 Sending A Message From The Contact
 Manager, 153
 Word Processing
 Merging with TeleMagic, 120
 Printing Documents, 134, 135
 Word Processor
 Changing Documents, 131
 Corel
 WordPerfect for Windows 7.0 or 8.0, 132

- Creating Documents & Form Letters, 122
- Documents
 - Faxing, 148
- Form Letters, 122
- Windows Write/WordPad, 130
- Word 7.0, 131
- WordPerfect 7.0 or 8.0, 132
- WordPro 97, 132
- Linking Documents to Contact Records, 125
- Linking Documents to Records on Different Levels, 127, 128
- Linking Documents to Records on the Same Level, 126
- Linking Documents to the Current Record, 126
- Lotus

- WordPro 97, 132
- Merge Fields, 131
- Microsoft
 - Windows Write/WordPad, 130
 - Word for Windows 7.0, 131
- Quick Letter, 133
- Selecting a Document, 121
- Setting Up Documents, 131
- Using Custom Merge Fields, 128

Y

- Year 2000, 32